Information Builders

WebFOCUS

WebFOCUS Managed Reporting
Development and Administration
Web Browser Edition
Version 5 Release 2

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Preface

This documentation describes the WebFOCUS Managed Reporting Administrator's and Developer's environments, which enable the creation of powerful EIS and decision-support applications that deliver easy access to the information that users need, regardless of hardware platforms, database structures, or application programs. It is intended for system administrators, application developers, and Web designers.

How This Manual Is Organized

This manual includes the following chapters:

Chapter		Contents
1	Introducing WebFOCUS	Describes Managed Reporting, ReportCaster, and Dashboard. Explains Managed Reporting concepts, Dashboard customization, and how to access and use Managed Reporting and Dashboard.
2	Creating Domains and Standard Reports	Describes how to create, edit, and view properties of Domains and Standard Reports. Also explains how to run and run defer Standard Reports and how to work with server and application path properties.
3	Creating Reporting Objects	Describes how to create and run Reporting Objects, which can contain different components: Others (procedures you code in the text editor), Joins, Defines, Filters, Where statements, Report templates, Graph templates, and Replications.
4	Publishing Reports	Describes how to use the Publish utility to create an HTML launch page for a report listed in the Standard Reports folder.
5	Data Servers Feature	Describes how to work with the Data Servers feature to access file resources on all WebFOCUS Servers in your environment. Explains how to create and manage metadata, stored procedures, HTML form files, WebFOCUS Stylesheets, and Other Files (for applications only).

Chapter		Contents
6	Creating Users and Groups	Describes how to create user profiles and groups, and associate users with groups and domains with the User Administration interface.
7	User Management	Describes how the User Management tree object is used to view all types of user's reports and to open, edit, run, save, and delete Managed Reporting user's reports.
8	Creating Public and Group Views	Describes how to create and manage public views (general and custom) and group views from the Public Views and Group Views windows in the View Builder. From the Public/Group Views windows you can add, remove, edit or copy a public or group view.
9	Customizing Dashboard	Describes how to customize the Dashboard by choosing colors, adding a logo, selecting the position of the Domain Tree, Role Tree, and banner, and more.
10	Creating a Role Tree	Describes how to create Role Trees, which allow Dashboard users access to items (reports, graphs, launch forms, and URLs) that have been associated with their Managed Reporting User Groups.
11	Creating a Content Block	Describes how to create Content blocks, which display when a user opens Dashboard. Content blocks can contain launched reports, links to reports, links to Internet resources, or output.
12	Managing the Dashboard	Describes how the Administrator controls what users can access in the general public view, the custom public view, and in group views. This includes the domains they can view and certain functionality such as the Domain Search.
13	Change Management	Describes features in Managed Reporting that can be used to facilitate change management, which is the process of moving application components between WebFOCUS environments.
14	Managed Reporting Extract Utility	Describes how the Managed Reporting Extract utility allows you to extract data from your Managed Reporting Repository in order to generate reports about users, groups, domains, and domain content.

Chapter		Contents
15	PDA Sync Administration	Describes how Palm™ and Pocket PC mobile users can select the PDA Sync report property for Standard Reports. These reports are then sent to PDA users authorized for sync access.
16	Two-Way Email Administration	Describes how Two-Way Email enables mobile business professionals to receive WebFOCUS reports through email, using a handheld device, laptop, or desktop.
17	ReportCaster Alerts Administration	Describes how alerts enable Managed Reporting Administrators and Domain Admins to distribute entire reports or selected sections of a report only when certain test conditions are met.
18	Enhancing Metadata	Describes how to edit, delete, OLAP-enable, and cache your metadata. Also explains how to create and view brief and detailed descriptions of your data.
19	Additional Administration Topics	Provides additional information for Administrators about Deferred Receipt, Report Assistant and Graph Assistant, browser window features, and tracing the WebFOCUS Client and Java Applet.

Documentation Conventions

The following conventions apply throughout this manual:

Convention	Description
`THIS TYPEFACE` or `this typeface`	Denotes syntax that you must enter exactly as shown.
`this typeface`	Represents a placeholder (or variable) in syntax for a value that you or the system must supply.
<u>`underscore`</u>	Indicates a default setting.
this typeface	Represents a placeholder (or variable) in a text paragraph, a cross-reference, or an important term. It may also Indicate a button, menu item, or dialog box option you can click or select.

Convention	Description
this typeface	Highlights a file name or command in a text paragraph that must be lowercase.
Key + Key	Indicates keys that you must press simultaneously.
`{ }`	Indicates two or three choices; type one of them, not the braces.
`[ ]`	Indicates a group of optional parameters. None are required, but you may select one of them. Type only the parameter in the brackets, not the brackets.
`|`	Separates mutually exclusive choices in syntax. Type one of them, not the symbol.
`. . .`	Indicates that you can enter a parameter multiple times. Type only the parameter, not the ellipsis points (…).
`.` `.` `.`	Indicates that there are (or could be) intervening or additional commands.

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Information You Should Have

To help our consultants answer your questions most effectively, be ready to provide the following information when you call:

- Your six-digit site code number (*xxxx.xx*).
- Your WebFOCUS configuration:
  - The front-end you are using, including vendor and release.
  - The communications protocol (for example, TCP/IP or HLLAPI), including vendor and release.
  - The software release.
  - The server you are accessing, including release (for example, 5.2).
- The stored procedure (preferably with line numbers) or FOCUS commands being used in server access.
- The name of the Master File and Access File.
- The exact nature of the problem:
  - Are the results or the format incorrect? Are the text or calculations missing or misplaced?
  - The error message and return code, if applicable.
  - Is this related to any other problem?
- Has the procedure or query ever worked in its present form? Has it been changed recently? How often does the problem occur?
- What release of the operating system are you using? Has it, WebFOCUS, your security system, communications protocol, or front-end software changed?
- Is this problem reproducible? If so, how?

- Have you tried to reproduce your problem in the simplest form possible? For example, if you are having problems joining two data sources, have you tried executing a query containing the code to access a single data source?
- Do you have a trace file?
- How is the problem affecting your business? Is it halting development or production? Do you just have questions about functionality or documentation?

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Contents

CHAPTER 1

Introducing WebFOCUS

Topics:

- WebFOCUS Products
- Using Managed Reporting
- Accessing Dashboard
- Customizing Dashboard

WebFOCUS is a complete, Web-ready, enterprise data access and reporting system, which takes advantage of the low-cost, low-maintenance, and wide distribution capabilities of the World Wide Web and internal corporate Web sites.

WebFOCUS enables application developers and Web designers to create powerful EIS and decision-support applications that deliver easy access to the information that users need, regardless of hardware platforms, data source structures, or application programs. Developers can create sophisticated Web pages that enable end users to view static reports, to run dynamic reports, and to create parameterized queries for individual requests.

The WebFOCUS Business Intelligence Dashboard is an HTML-based thin client that allows you to create a customized user interface for access to WebFOCUS Managed Reporting.

When you connect to Dashboard you are also connecting to WebFOCUS Managed Reporting, which means all of the Standard Reports and Reporting Objects that are available in Managed Reporting will also be available in Dashboard.

WebFOCUS Products

To develop Web-based reporting applications, WebFOCUS provides integrated Java-based development tools that are seamlessly integrated with the WebFOCUS server-side software components. WebFOCUS enables developers to prototype, test, and deploy Web-based reporting applications quickly, without requiring knowledge of HTML, Web server administration, or the FOCUS 4GL reporting language. WebFOCUS offers the following application development and deployment tools:

- Managed Reporting
- ReportCaster
- Business Intelligence Dashboard

Managed Reporting

Managed Reporting provides a streamlined reporting environment that virtually eliminates the complexities of today's corporate data. Managed Reporting Administrators can use the Domain Builder tool to develop the users' Managed Reporting environment, including Standard Reports and Reporting Objects. With the User Administrator tool available from the Managed Reporting browser or Developer Studio environments, Administrators can manage access to Managed Reporting domains by granting authorized users access to the information they need, while restricting unauthorized users from sensitive or confidential corporate data.

Users of Managed Reporting can create and save reports that meet their individual business needs without knowing the details and complexities of the underlying data source or of the FOCUS reporting language. Managed Reporting ensures that users can access the information they require, while protecting sensitive or confidential data.

ReportCaster

ReportCaster is an optional Java-based tool that provides a single point of management for report scheduling and distribution via the Web, e-mail, Managed Reporting, or a printer. ReportCaster enables you to provide essential, updated information directly to the people that need it, on time, automatically.

You can access ReportCaster by clicking the *ReportCaster* icon on thegray toolbar in Managed Reporting. All ReportCaster functions are available from your reporting environment, including:

- Scheduling reports to be run once or repeatedly.
- Bursting reports to send specific values in a report to different users, files, or printers.
- Distributing report output via e-mail, FTP, printer, or Managed Reporting.
- Maintaining scheduled jobs, the address book of distribution lists, and log files.

For more information about ReportCaster, see the *WebFOCUS ReportCaster Development and Administrator's* manual.

Business Intelligence Dashboard

The WebFOCUS Business Intelligence Dashboard allows you to create a customized user interface for access to WebFOCUS Managed Reporting.

From Dashboard you can:

- Customize the look of the WebFOCUS environment.
- Create personalized content blocks that can contain launched reports, links to reports, and links to Internet resources.
- Search domains available in the WebFOCUS environment.
- Create and manage public views.
- Dynamically access non-WebFOCUS documents.
- View the status of deferred reports.
- Access reporting tools such as Report Assistant, Graph Assistant, and ReportCaster.

Managed Reporting Concepts

Managed Reporting Administrators create and manage user environments. Managed Reporting Domain Admins develop content for users. Managed Reporting users can run Standard Reports, defined in advance by a Managed Reporting Administrator or a Domain Admin. In addition, Managed Reporting users can create and save reports that meet their individual business needs without knowing the details and complexities of the underlying data source or of the FOCUS reporting language.

To organize the Standard Reports and Reporting Objects available to users, Managed Reporting Administrators create a series of domains, using the Managed Reporting Domain Builder. Organizing Standard Reports and Reporting Objects by domains ensures that users can access the information they require, while protecting sensitive or confidential data.

Managed Reporting Capabilities

As a Managed Reporting Administrator or Domain Admin, you create the Standard Reports that users run, as well as publish the HTML launch pages used to call reports that require parameters. In addition, you can perform the following:

- **Create access rights to Managed Reporting.** To enable a user to access Managed Reporting, you must create a user account for every user and specify the groups every user is a member of. You also specify which reporting domains belong to each group. User accounts and groups are created with the User Administration Tool. For more information about the User Administration Tool, see Chapter 6, *Creating Users and Groups*.
- **Create and access the metadata for data sources.** To create a report that accesses a data source, you must first create and access the metadata for that data source. Metadata is information about the structure of the data itself, such as the columns or fields in the data source, their format, or the location of the data sources.

  You create and manage metadata from the Data Server feature in Domain Builder. You can enhance this metadata with additional descriptive information like the business context of a particular field. For details, see Chapter 18, *Enhancing Metadata*.
- **Build the reports that retrieve and format data.** Using Managed Reporting, you can build, test, and deploy sophisticated tabular reports and graphs, without knowing the FOCUS reporting language. In addition to creating new report procedures, you can move existing procedures from the WebFOCUS Reporting Server to the WebFOCUS Managed Reporting Repository in order to modify or enhance them.For information about using the Standard Reports folder to create tabular reports and graphs, see Chapter 6, *Creating Users and Groups*. For information about using report procedures stored on the WebFOCUS Reporting Server, see Chapter 5, *Data Servers Feature*.
- **Create Reporting Objects for users.** Managed Reporting lets you create Reporting Objects for Managed Reporting and Dashboard users. Reporting Objects are representations of data sources, which present the available data using terms and formats meaningful to the user. Using predefined Reporting Objects, Managed Reporting users build and save their own reports without having to know the details and complexities of the underlying data sources.
- **Create OLAP-enabled reports.** Managed Reporting enables you to update metadata files to make them OLAP-enabled as well as to create OLAP-enabled Standard Reports and Reporting Objects for your users. Users can run OLAP-enabled reports and use the OLAP selections panel or the OLAP Control Panel to manipulate the reports in order to view different representations of the data, without modifying the actual Standard Report or Reporting Object. See the *WebFOCUS Managed Reporting End User's Manual* for more information.

- **Publish HTML launch pages for the reports.** After you create and test your reports, you can use Managed Reporting to publish the report to the Web. When you publish a report, you create a *launch page*, a complete HTML file that calls the report procedure. You can create an HTML launch page for any report stored using Managed Reporting. These launch pages can be published back to the domains environment or outside of the Managed Reporting environment where they can be incorporated into a self-service application.

  You can customize launch pages by editing the HTML file to add additional HTML tags and syntax. For example, the HTML launch page can include image files (GIF or JPG files), tables, frames, JavaScript™ functions, and hypertext links to other Web pages. In addition, the launch pages that you create can be accessed via HTML hyperlinks from other Web pages.

- **Schedule reports.** Managed Reporting provides access to ReportCaster, where you can schedule and distribute Standard Reports. ReportCaster enables you to provide essential, updated information directly to the people that need it, on time, automatically. For information about scheduling and distributing report output with Managed Reporting, see the *ReportCaster Development and Administration Manual*.

- **Distribute reports when certain test conditions are met using ReportCaster Alerts.** A ReportCaster Alert sends notification to a user whenever a specified event takes place within a data source. This allows the user to remain in constant communication with a data source from any location. You are able to create test conditions (rules) and specify how often you would like these rules or events to be checked against a data source. ReportCaster can then generate a report or sections of that report (burst option) as a result of the alert.

  ReportCaster Alerts work with all e-mail clients, including the following mobile devices: Palm OS®, Pocket PC, BlackBerry™, and WAP-enabled mobile phones. Alerts can also be sent to any PC or laptop computer with e-mail capability. For more information, see Chapter 17, *ReportCaster Alerts Administration*.

- **Receive a WebFOCUS report by Two-Way Email.** As a Managed Reporting Administrator or Domain Admin, you use Managed Reporting to create and maintain Two-Way Email templates, the means by which a user requests a report. You also use the Two-Way Email Administrator Console to manage subscriber information, monitor the execution of report requests, cancel requests, and perform other administrative tasks. For more information, see Chapter 16, *Two-Way Email Administration*.

- **Synchronize Standard Reports to a PDA (Personal Digital Assistant).** For Palm Computing and Windows Pocket PC mobile users, you can select the PDA Sync report property for Standard Reports. These reports are then sent in a compressed format to PDA users you have authorized for sync access.

  You can publish Standard Reports as channels to PDAs via the AvantGo Enterprise Server. AvantGo enables subscribed users to view standard HTML content on a PDA, regardless of whether the user is currently connected to the Web. Content is placed on the PDA using its standard data synchronization (or sync) functionality. For more information about PDA Sync, see Chapter 15, *PDA Sync Administration*.

- **Customize the Managed Reporting environment.** Managed Reporting lets you customize the user environment by adding profiles and customized help files to domains. A profile, which runs each time a user opens a Managed Reporting domain, can provide an introductory report or information about the Managed Reporting domain. Customized help files, which users access from the Managed Reporting domain, provide additional information specific to the Managed Reporting domain, such as detailed explanations of Standard Reports and Reporting Objects. See also *Customizing Dashboard* on page 1-11.

Using Managed Reporting

As a Managed Reporting Administrator or Domain Admin, you use the following tools to create and manage the Managed Reporting user environment:

- **Domain Builder** enables you to create Standard Reports that users run, launch pages that make those reports available on the Web, and Reporting Objects for users to create their personal reports. For more information, see Chapter 2, *Creating Domains and Standard Reports*.

- **User Administration** enables you to configure user access to the Managed Reporting Environment by specifying user profiles and the domains that the users can access. Grouping users and domains ensures that users can access the information they need, while protecting sensitive or confidential data. User Administration is only available to Administrators. It is not available to Domain Admins. For more information, see Chapter 6, *Creating Users and Groups*.

- **ReportCaster** is an optional tool that enables you to schedule the execution of Standard Reports and, distribute the information directly to the people that need it, on time, automatically. ReportCaster requires ReportCaster Administrator privileges. For more information, see the *ReportCaster Development and Administration Manual*.

- **PDA Sync** report property enables Palm Computing and Pocket PC mobile users to receive WebFOCUS Managed Reporting-based Standard Reports. Once this property is selected, Managed Reporting users who have been granted PDA Sync privileges can sync with WebFOCUS to receive PDA Sync-enabled Standard Reports on their PDAs. For more information about PDA Sync, see Chapter 15, *PDA Sync Administration*.
- **Two-Way Email** enables mobile business professionals to request and receive WebFOCUS reports through e-mail, using a handheld device, laptop, or desktop. For more information, see Chapter 16, *Two-Way Email Administration*.

The Managed Reporting Administrator also has access to the Managed Reporting user environment, via the Domains component. For more information on domains see the Managed Reporting End User manual. Access to Dashboard is through a separate URL. See *How to Open Dashboard* on page 1-10.

When you log on as a Managed Reporting Administrator or Domain Admin, the Domain Builder component automatically opens underneath the Managed Reporting toolbar. Domain Builder displays the Managed Reporting Repository, which contains the components that you use to create, test, and deploy domains, Standard Reports, and Reporting Objects for Managed Reporting users.

- The toolbar contains the tools required to work with domains, Standard Reports, Reporting Objects, and Web launch pages. The toolbar provides buttons, with ToolTips, that enable you to access these tools and perform these development tasks. See *Using the Toolbar* on page 1-8 for information about the tools that the toolbar provides.
- The Data Server component lets you create, access, and use data source descriptions and procedure files that reside on the WebFOCUS Reporting Server. The Data Server component contains the stored procedures and Master Files called by the reports that you create.

Using the Toolbar

The WebFOCUS Managed Reporting Domain Builder and Domains environments both provide access to the toolbar.

The toolbar contains the tools required to create, test, edit, and publish report procedures and Web launch pages. Using the toolbar, you can create the metadata for data sources, build the reports that retrieve and format that data, and generate Web pages that enable users to run the reports. You perform these tasks using the following toolbar buttons:

Button	Description
New	Adds a new component. For example, if you highlight the Domains folder and then click *New*, you create a new domain.
Open/Close	Opens/closes a selected object.
Edit Source	Displays the code for the selected object (report, procedure, or launch page) in the text editor window.
Search	Enables you to search the selected domain, folder, or object.
Refresh	Updates the contents of the Managed Reporting Repository window. This button is useful when more than one Administrator is working in Managed Reporting. Changes one Administrator makes to the Repository may not always be visible to other Administrators. This feature is context sensitive; only the selected object will refresh.
Run	Executes the selected report or displays the selected launch page.
Run Deferred	Executes the selected report in deferred mode.
Deferred Status	Displays the Deferred Report Status Interface in a new browser window.
Publish	Creates an HTML launch page for the selected report. For more information, see Chapter 4, *Publishing Reports*.

Button	Description
ReportCaster	Enables you to access ReportCaster. For more information, see the *WebFOCUS ReportCaster Administrator's Manual*.
ReportCaster Console	Enables you to access the ReportCaster Console. For more information, see the *WebFOCUS ReportCaster Administrator's Manual*.
Report Library	Enables you to access the content in the Report Library.
Cut	Removes an object (Standard Report, Reporting Object, launch page, or Other File) from the domain and copies it to the clipboard.
Copy	Copies an object to the clipboard.
Delete	Removes the selected folder or object.
Paste	Places the clipboard item into the indicated destination, if appropriate.
Properties	Displays the name and data source of the selected object.
Help	Displays online help.

Accessing Dashboard

There are several views in Dashboard:

- **Public.** This view is accessible to public users and cannot be personalized. Public users have execute-only access; they cannot save report requests or report output to a domain. See *How to Open Dashboard* on page 1-10.
- **Group.** A group view is accessible to users with a valid Managed Reporting user ID and password. The user must be a member of the group to gain access to the view. Group views cannot be personalized by users.
- **Private.** This view is accessible to users with a valid Managed Reporting user ID and password. From this view a user can add to or edit the content blocks the administrator has set up. See *How to Open Dashboard* on page 1-10.

In addition to the public, group, and private views you can also use the View Builder to create a unique look for each public and group view.

When a user opens Dashboard, a single logon page is displayed. You can set a user ID and password for the public user so they do not have to enter login information when they open Dashboard.

For additional security, you can configure the Dashboard logon page so users log on to both Dashboard and the WebFOCUS Reporting Server. For more information, see the Installation and Configuration manual for your platform. You can also integrate the Dashboard logon with other systems such as Web server or LDAP security. See the *WebFOCUS Security and Administration* manual for details.

Procedure How to Open Dashboard

Enter the following URL in your Web browser

```
http://webserver[:portnumber]/ibi_apps/bid
```

where:

webserver

Indicates the name of the Web server that runs Dashboard.

The WebFOCUS Business Intelligence Dashboard index page opens with links to:

- Public Views.
- Group Views.
- WebFOCUS BI Dashboard Login Page.
- WebFOCUS BI Dashboard View Builder Login Page.

You can access the following pages directly by entering the URL

`http://`*`webserver`*` [`*`:portnumber`*`]/ibi_apps/bid/`*`pagename`*

where:

`pagename`

Is one of the following:

Page Name	**Description**
vb	Opens the View Builder login page.
mpv	Opens the public views index page. This page lists all existing public views.
public	Opens the general public view.
*viewname*_public	Opens the specified public view. *Viewname* is automatically generated when the view is created in the View Builder.
*viewname*_gbv	Opens the specified group view. *Viewname* is automatically generated when the view is created in the View Builder.
login	Opens the user login page.
passchange	Opens the change password page.
end-vb	Cancels a View Builder session.

Customizing Dashboard

When you create a customized view of Dashboard you can:

- Create a unique customization for each public and group view. This includes selecting a template, selecting custom colors, positioning the Domain Tree, Role Tree, and banner, inserting a company logo and much more.
- Create the default content blocks that the user sees when a Dashboard public or group view is opened.
- Create and edit public and group views.
- Identify the Managed Reporting password that the Dashboard will use to connect the public user to Managed Reporting.

- Set a default user ID and password for the public user. When a user ID and password are set, the public user does not have to enter login information when accessing a public view.
- Create Role Trees for Managed Reporting User Groups. For details, see Chapter 10, *Creating a Role Tree*.

For complete details, see Chapter 9, *Customizing Dashboard*.

CHAPTER 2

Creating Domains and Standard Reports

Topics:

- Using Domains in Managed Reporting
- Working With the Server and Application Path Properties
- Working With Standard Reports
- Creating and Editing Standard Reports
- Applying Predefined StyleSheets to a Report
- Deferred Receipt
- Adding a Uniform Resource Locator
- Importing Procedures and Other Files Into WebFOCUS
- Ignoring Code in a FOCEXEC
- Execution of a Managed Reporting Procedure Using -INCLUDE
- Execution of a Server Procedure
- Customizing Managed Reporting

A domain is a graphical, easy-to-use environment for organizing related information. For example, a typical corporate structure could consist of an accounting domain, a sales domain, and an inventory domain. The Domains view provides an environment that developers can use to build and test procedures and Web pages that launch those procedures. There is no limit to the number of domains you can create.

Using Domains in Managed Reporting

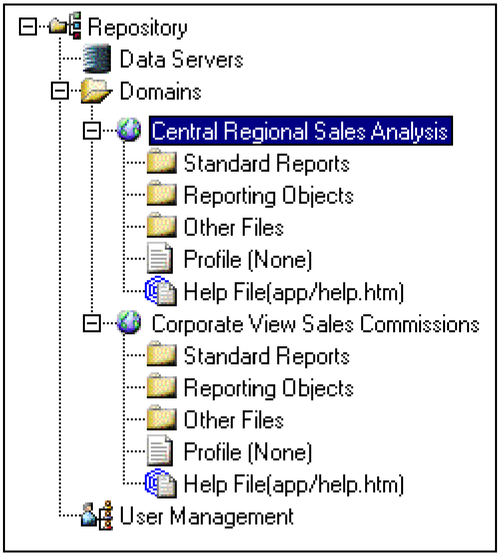
As a Managed Reporting Administrator or Domain Admin, you have access to two environments: Domain Builder and the Domains view. Domain Builder enables you to create reporting environments for end users. From Domain Builder, you manage the types and the amount of data a user can access in a reporting environment.

The Domains view represents the Managed Reporting user environment. Here, reporting environments you created in Domain Builder display as end users would see them. For more information, see the *Managed Reporting End User's Manual*.

A domain organizes Standard Reports and Reporting Objects into logical groups, such as Payroll and Sales. A domain is organized into a series of folders and components. A domain contains the following elements:

Standard Reports folder	Contains the Standard Reports you create for end users. Users run these reports, but they cannot change them. For information about creating Standard Reports for users, see *Working With Standard Reports* on page 2-9.
Reporting Objects folder	Contains views of your organization's data that users can access for ad hoc reporting and to create their own reports. For information about creating Reporting Objects for users, see Chapter 3, *Creating Reporting Objects*.
Other Files folder	Contains image (.gif, .jpg), StyleSheets (.sty), and HTML files that you use to customize and enhance reports. Users cannot access this folder. The folder also provides temporary storage for reports and procedures that you are migrating from other WebFOCUS platforms.
Profile component	The domain profile runs each time a user opens the domain. This profile can display an HTML page or the results of a WebFOCUS procedure prior to entering a domain. For information about using profiles and help files, see *Importing Procedures and Other Files Into WebFOCUS* on page 2-31.
Help component	The help component contains an organization-specific help file that users can access from the Domains view reporting environment. For information about using profiles and help files, see *Importing Procedures and Other Files Into WebFOCUS* on page 2-31.

WebFOCUS organizes these folders and components under each domain in the following manner:

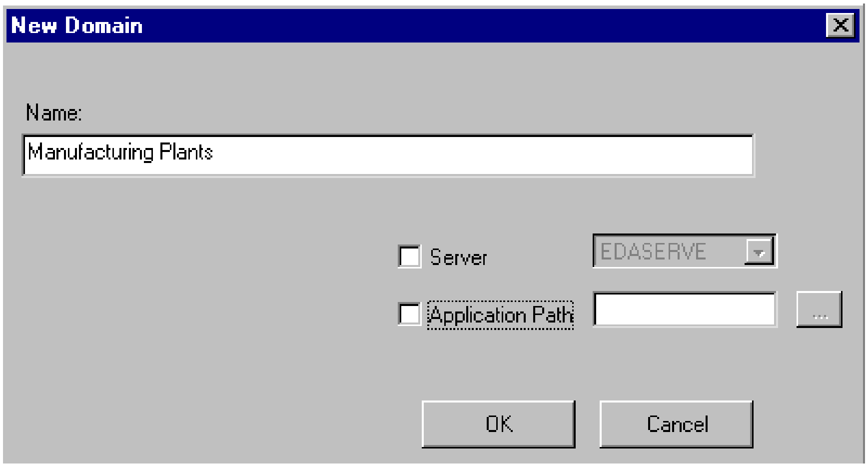


WebFOCUS creates these folders whenever you create a new domain. These folders appear below each domain in the Domain Builder.

Procedure How to Create a Domain

1. Right-click the Domains folder and select *New Domain*. The New Domain dialog box opens.

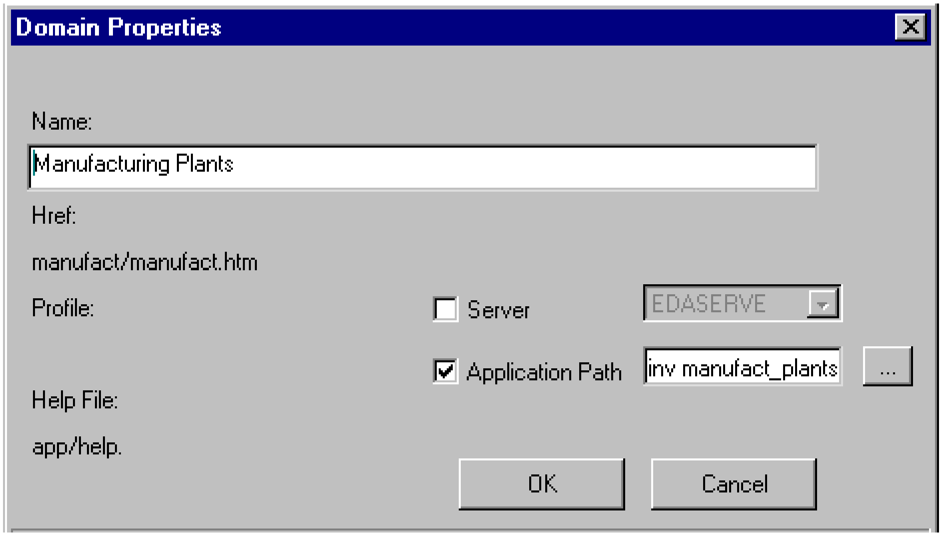
   Note: Only Administrators can create domains; Domain Admins cannot.



2. Enter the name of the new domain in the Name box.
3. Optionally check *Server* to choose a server from the drop-down list.
4. Optionally check *Application Path* to choose your application and override the server's default search path. For more information, see *Working With the Server and Application Path Properties* on page 2-5.
5. Click *OK*.

Procedure How to Set Domain Properties

1. Right-click the domain for which you want to set properties. The Domain Properties dialog box opens:



2. Make your changes to the Server and/or Application Path.

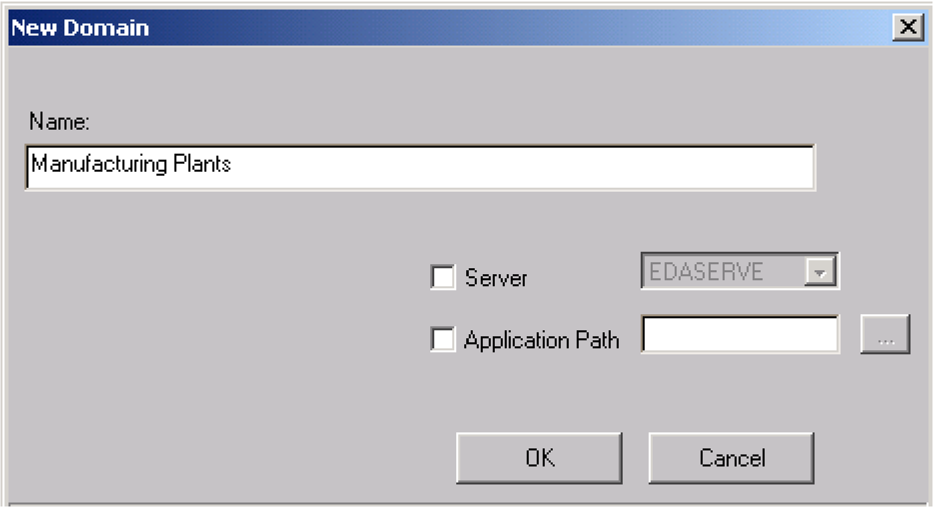
   Note: You can specify multiple application names (for example, inv and manufact_plants) by separating them with a space in the Application Path text box.

3. Click *OK* to remove the old properties and to set the new properties in the Managed Reporting Repository. Click *Cancel* to retain the original properties.

Note: Domain properties can be set or reset at any time. Care must be taken that any change you make does not adversely affect the behavior of existing reports. For example, if you change the server or application path settings in the domain properties, all reports and reporting objects in that domain inherit these changes when you click *OK*.

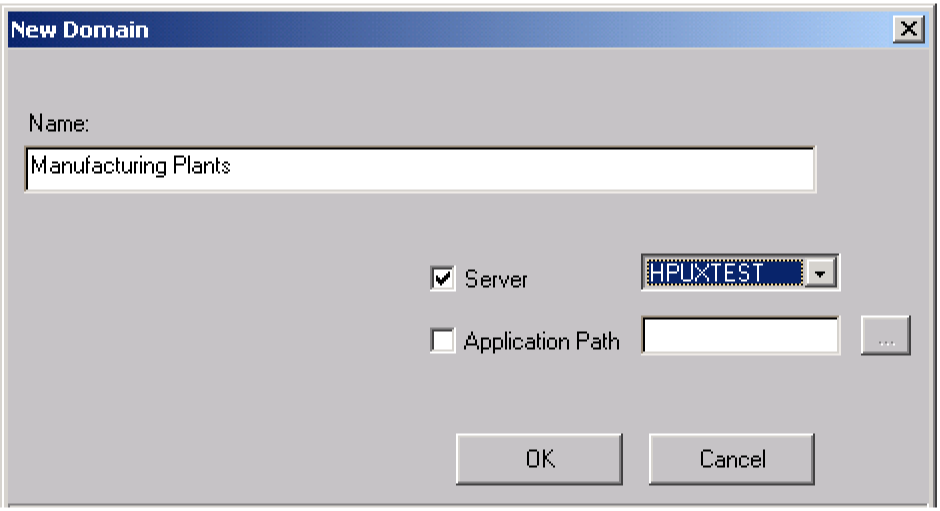
Working With the Server and Application Path Properties

When you create a new Domain, the Server property is unselected, and the drop-down list of WebFOCUS Reporting Server node names is disabled. The default server detected for your session is displayed in the list box. All reports and reporting objects in this domain will inherit the server setting shown in this list box.



The default server is determined by WebFOCUS and depends on a number of factors. Typically, the server displayed will be the one defined by the IBI_REPORT_SERVER setting in the WebFOCUS script file named cgivars.wfs. You can change this setting using the WebFOCUS Client Console (see the *Summary of New Features* manual). If you have logged onto Managed Reporting with a customized logon page on which a value for IBIC_server was specified, then this server will be displayed in the list as your session's default server.

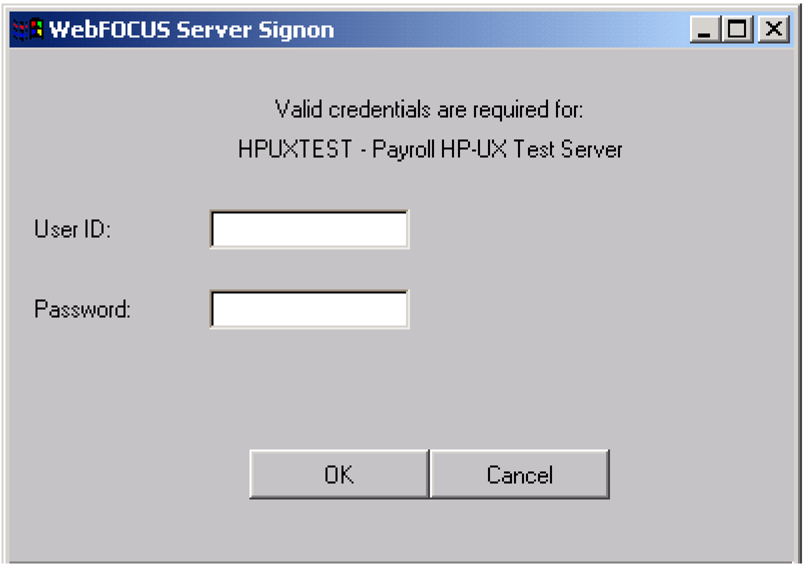
If all of your data is on one Reporting Server, then you should leave this property unchecked. If you have more than one Reporting Server and you wish to fix the server that this domain uses, then you should check the Server property and make your selection from the list. All of the servers (including Cluster Nodes) from your WebFOCUS Communications Configuration file are displayed in the list. For more information about configuring servers for your environment, see the WebFOCUS Client Console documentation in the *Summary of New Features* manual.



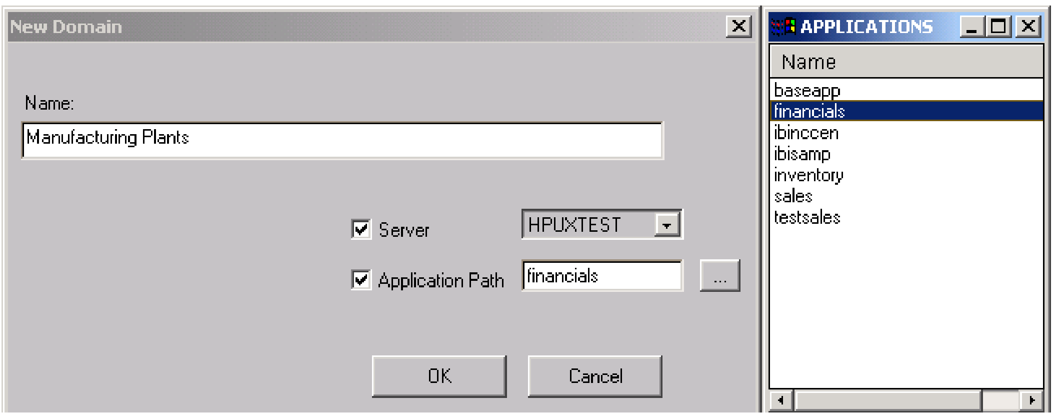
The Application Path property is also unselected by default. This means that Managed Reporting requests will be processed by the WebFOCUS Reporting Server's default search path. The server's search path is generally determined by the settings in its profile, but can be overridden by user and group profiles also (depending on platform). For more information about server search path behavior, consult the iWay server administration documentation for your platform.

If you wish to override the server's default search path behavior for reports run from this domain, you should check the Application Path property. This enables the associated text box. You can then enter the application path manually, or click the ellipses button to retrieve a list of applications on the server.

If server security is enabled and valid credentials are not sent to the server, you will be prompted for WebFOCUS Server credentials. For more information about the security features of WebFOCUS and how to configure them for your site, refer to the WebFOCUS Security and Administration guide.



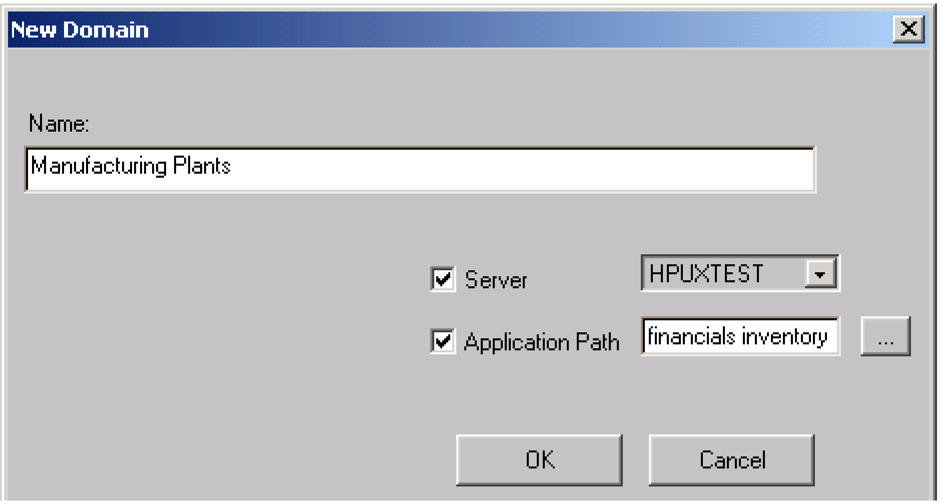
After the server has received valid credentials, the Applications window appears. These applications are retrieved dynamically from the server shown in the Server list box. You can create and manage the resources in these applications from the Data Servers component in Domain Builder. See Chapter 5, *Data Servers Feature*.



As you select an application, it is written to the Application Path text box. Only a single application can be selected in the window at one time and this value is written to the text box. The Application Path property sends the APP PATH values command to the server, where values is what is you entered in the text box. This overrides the server's default search path (it does not append to it).

It is possible to specify more than one application in the text box, however you must type them in manually. The Application window only allows you to select one. This limitation will be removed in a future release.

The properties are applied when you click the *OK* button and then take effect immediately. A domain's properties are inherited by the reports under it and can be overridden at the report level as shown in the next section.



At any time after the domain is created, you can change these settings by pulling up the domain's property dialog. Changes made are applied and take effect immediately upon clicking the *OK* button.

Working With Standard Reports

Using the tools supplied in Domain Builder, you can build, test, and deploy sophisticated tabular reports and graphs and easily make them available to end users without knowing the FOCUS reporting language.

The reports and graphs that you create or import are stored in the Standard Reports folder. The Standard Reports folder contains group and subgroup folders, which provide an additional means of organizing your Standard Reports. For example, one Standard Reports group folder can contain Standard Reports for inventory management, and another Standard Reports group folder can contain Standard Reports for accounting and billing.

After you create the account group folder, you can create the actual Standard Report. Multiple Standard Reports can be contained in one Standard Reports group folder. The Standard Reports folder, group folders, and individual Standard Reports are organized in a hierarchical, tree-like structure.

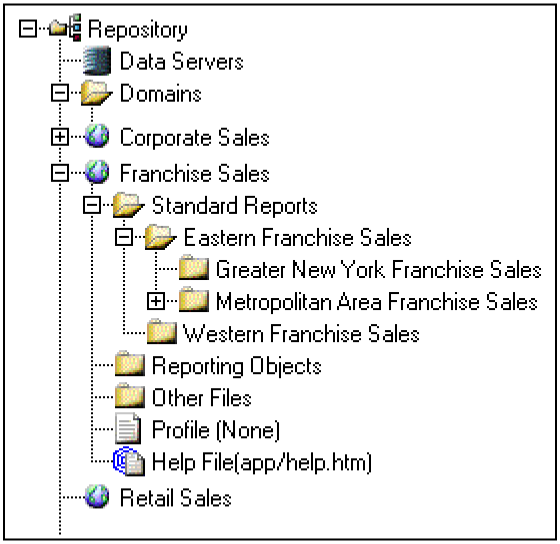
You can work with the Standard Reports folder, group and subgroup folders, and individual Standard Reports using the toolbar. Using this toolbar, you can create group and subgroup folders and Standard Reports, work with existing Standard Report groups and reports, edit Standard Report source code, run Standard Reports to verify the report output, create Web pages for Standard Reports (described in Chapter 4, *Publishing Reports*), and schedule Standard Reports to run at predetermined dates and times.

In addition to creating new Standard Reports, you can migrate existing procedures from other WebFOCUS products to a Standard Reports folder to make them available to users.

If your Standard Reports require additional files, such as graphic (.gif or .jpg) files, StyleSheet files, or additional HTML files, use the Other Files folder to store these files. You can use the toolbar to work with the files in the Other Files folder. See *Importing Procedures and Other Files Into WebFOCUS* on page 2-31 for more information.

Working With Subgroup Folders

You can create subgroup folders that add an additional level of organization to Standard Reports and Reporting Objects. WebFOCUS displays subgroup folders underneath a group folder.



For example, in this view from Domain Builder, Metropolitan Area Franchise Sales is a subgroup folder under the Eastern Franchise Sales group folder.

Subgroup folders have the same functionality as group folders. Users can select any Standard Report listed under a subgroup folder and perform any function available to them by clicking the appropriate button.

Group folders can contain any number of subgroup folders, although subgroup folders are limited to one sublevel. Subgroup folders are an optional feature. When an Administrator or Domain Admin creates a subgroup folder, Standard Reports can be added directly to the subgroup folder. Administrators and Domain Admins can also continue to add Standard Reports to group folders.

Procedure How to Create a Standard Reports Group Folder

1. Expand the domain to which you want to add a Standard Report.
2. Select the Standard Reports folder.
3. Right-click and select *New Standard Report Group* or click the *New Standard Report Group* icon in the toolbar.

   The New Standard Report Group dialog box opens.
4. Enter the name of the group folder in the Name input box.
5. Click *OK*.

The new group folder opens below the Standard Reports folder.

Procedure How to View Standard Report Group Properties

1. Expand the domain that contains the group folder you want to review.
2. Expand the Standard Reports folder.
3. Select the group folder that you want to review.
4. Right-click and select *Properties* or click the *Properties* icon in the toolbar.

   The Standard Report Group Properties window opens and displays the name of the selected group folder.
5. If you want, enter a new name for the group folder.
6. Click *OK* to save your changes, or click *Cancel* to discard your changes.

Procedure How to Create a Standard Report Subgroup Folder

1. Right-click the Standard Reports folder name and select *New Standard Report* or select the *Standard Reports* group folder.
2. Click *New Folder* on the pop-up menu.

   or

   Click the *New* icon in the toolbar, then click *New Folder.*

   The New Standard Report Group dialog box opens.
3. Enter a descriptive name for the subgroup folder in the Name input box.
4. Click *OK*.

The new Standard Report subgroup folder displays under the group folder you selected.

Procedure How to Move a Standard Report to Another Group Folder

1. Expand the domain that contains the Standard Report you want to move.
2. Expand the Standard Reports folder and then expand the group folder that contains the Standard Report.
3. Select the Standard Report and click *Cut*.

   You are prompted to confirm your action. Click *OK* to continue.
4. Select the target Standard Reports group folder.

   Tip: The Standard Reports group folder can be in the same domain or in a different domain.
5. Click the *Paste* icon in the toolbar.

WebFOCUS moves the selected Standard Report to the Standard Reports group folder you selected.

Procedure How to Copy a Standard Report to Another Standard Reports Folder

1. Expand the domain that contains the Standard Report you want to copy.
2. Expand the Standard Reports group folder that contains the Standard Report.
3. To copy a Standard Report, select the Standard Report and click *Copy*.
4. Select the Standard Reports group folder to which you want to move the Standard Report.

   Tip: The Standard Reports group folder can be in the same domain or in a different domain.
5. Click the *Paste* icon in the toolbar.

WebFOCUS copies the selected Standard Report to the Standard Reports group folder you selected.

Procedure How to Copy a Procedure File to a Folder

1. Select the Data Server component in the Domain Builder. Double-click or click the *Open* icon in the toolbar.
2. Select the server you want to use and double-click or select the *Open* icon in the toolbar.
3. Double-click *Applications* to expand the list of applications. Select and double-click the application of your choice

   or

   Double-click the *Cataloged Path* application.

4. Expand the Procedures folder.
5. Select a procedure file and click *Copy*.
6. Expand the domain to which you want to add the procedure file.
7. Expand the Standard Reports folder and then expand the Standard Reports group folder to which you want to add the procedure file.
8. Click the *Paste* icon in the toolbar.

WebFOCUS adds the selected procedure file to the Standard Reports group folder.

Procedure How to Delete a Standard Report Group or Subgroup

1. Expand the domain that contains the group folder you want to delete.
2. Expand the Standard Reports folder.
3. Select the group or subgroup folder that you want to delete.
4. Click *Delete*.

   You are prompted to confirm the deletion.
5. Click *OK* to delete the group folder.

   Caution: If you delete a group folder, all subgroup folders and Standard Reports in the group and subgroup folders are also deleted.

Creating and Editing Standard Reports

Domain Builder provides the following tools for creating Standard Reports:

Report Assistant	A graphical tool that you use to create tabular reports.
Graph Assistant	A graphical tool that you use to create graphs.
Alert Wizard	A wizard that you use to create ReportCaster Alerts.
Editor	A text editor that you use to enter WebFOCUS commands to create a report or graph. For more information about using the WebFOCUS language, see the *Creating Reports With WebFOCUS Language* manual.
Import External File(s)	A Files list that contains files you can add to a Standard Report.
URL	A URL window in which you can specify the name and URL of your file. You can also specify whether you want to enable Show on User's List and PDA Sync.

Before you begin creating individual reports and graphs, you must create the Standard Reports group and subgroup folders that will store the reports and graphs. These group and subgroup folders display in a hierarchical, tree-like structure and provide an additional means of organizing your Standard Reports.

You can work with individual Standard Reports using the toolbar. Using this toolbar, you can create new Standard Reports, work with existing Standard Reports, and delete Standard Reports. Alternatively, you can right-click a subgroup folder to create a new Standard Report, or right-click a Standard Report to work with an existing report or delete a report. In addition, you can:

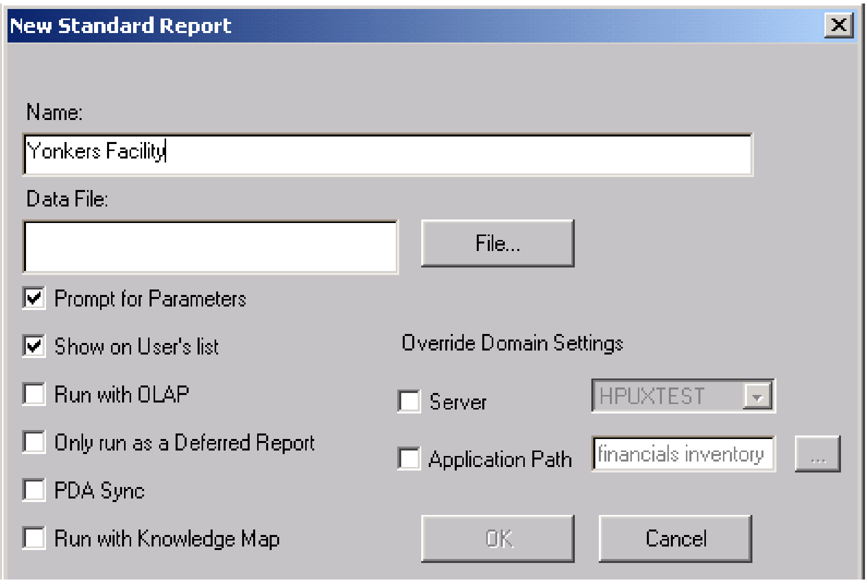
- Edit Standard Report source code.
- Run Standard Reports to verify the report output.
- Create Web pages for Standard Reports (described in Chapter 4, *Publishing Reports*).
- Distribute Standard Reports using ReportCaster. For more information, see the *WebFOCUS ReportCaster Development and Administrator's Manual*.

If your Standard Reports require additional files, such as graphic (.gif or .jpg) files, StyleSheet files, or additional HTML files, use the Other Files folder to store these files. See *Importing Procedures and Other Files Into WebFOCUS* on page 2-31 for more information.

Procedure How to Create a Standard Report

1. Expand the domain that will contain the Standard Report.
2. Expand the Standard Reports folder.
3. Select the group or subgroup folder that will contain the Standard Report and then click the *New* icon in the toolbar or right-click a group or subgroup folder and select *New Standard Report*. The New Standard Report options appear.
4. Click one of the following:
   - Report Assistant
   - Graph Assistant
   - Alert Wizard (when ReportCaster is installed)
   - Editor
   - Import External File(s)
   - URL
   - New Folder

   Note: Once you enter your WebFOCUS commands you can either save or run the report. If you run before saving, the report is run against the domain's default settings. Click *Save* from the editor to set a server and application. You can then run your report against the server and application you just selected.
5. If you select an assist tool, the New Standard Report dialog box opens:



6. Enter your report name.
7. Check *Server* to select a server from the drop-down list.
8. Check *Application Path* to choose your application. When you check Application Path, the ... button is activated. When you click ..., a window opens to the right of the New Standard Report dialog box that displays the available applications.
9. Select the application you want to use. The application appears in the box next to the Application Path check box in the New Standard Report window.
10. Click *File* to open the list of Master Files.
11. Select the Master File you want to use and click *OK*.

    Note: Syntax and error checking are not performed until the report or graph is executed.
12. Enter a descriptive name for the Standard Report in the Name input box.
13. Click *OK* to save the Standard Report.Click *OK*

    You return to Domain Builder. The Standard Report is listed under the group folder.

Procedure How to Add a Report to a Group or Subgroup Folder

1. From the Web server, copy the WebFOCUS procedure or HTML file in the Repository's or Domain's Import subdirectory.

   Note: The Repository (basedir directory), Domain directory, and the Repository's Import directory reside under the \install_directory\basedir directory. The Domain's Import subdirectory resides under the Domain directory. The name of the Domain directory contains only the first eight characters of the domain's description.
2. Launch WebFOCUS Managed Reporting.
3. From the Repository, open the domain in which you want to add the procedure or HTML file.
4. Select the Standard Reports group or subgroup folder that will store the procedure or HTML file.
5. Right-click and select *New Standard Report* or click the *New* icon in the toolbar.
6. Click *Import External File(s)*.

   WebFOCUS opens the Add Files dialog box and lists the procedure files and HTML files stored in the Repository's and the Domain's Import directory.

7. Do one of the following:

    - Select the procedure or HTML file you want to add to the domain from the list, and click *Add*.

    or

    - If you want to add every procedure and HTML file listed, click *Add All*.

    WebFOCUS adds the procedure or HTML file to the selected group folder and you return to the Managed Reporting Respository.

    Note: If the file already exists in the /basedir/domain_name/app directory, it will not be added because it will overwrite the existing file with the same name.

Procedure How to Delete a Standard Report

1. Expand the domain that contains the Standard Report you want to delete.
2. Expand the Standard Reports folder and then expand the Standard Reports group folder that contains the Standard Report.
3. Select the Standard Report you want to delete and click *Delete*.

    You are prompted to confirm your action.

4. Click *OK* to delete the Standard Report.

    WebFOCUS deletes the Standard Report from the Standard Reports group folder.

Procedure How to Edit Standard Report Source Code

1. Expand the domain that contains the Standard Report you want to edit.
2. Expand the Standard Reports folder and then expand the Standard Reports group folder that contains the Standard Report.
3. Select a Standard Report in the Standard Reports group folder.
4. Click *Edit Source*.

    The text editor window opens.

5. Make your changes to the Standard Report file.

    For details about WebFOCUS reporting commands and syntax, see the *Creating Reports With WebFOCUS Language* manual.

    Note: Syntax and error checking are not performed until the Standard Report is executed.

6. Save the changed Standard Report file, and close the text editor window. You return to Domain Builder.

Note: If you edit a Standard Report's source code and make changes to the Standard Report, you should not subsequently open the Standard Report with Report Assistant. If you need to make additional changes to the Standard Report, use the Edit Source button to open the file in the text editor.

Viewing Standard Report Properties

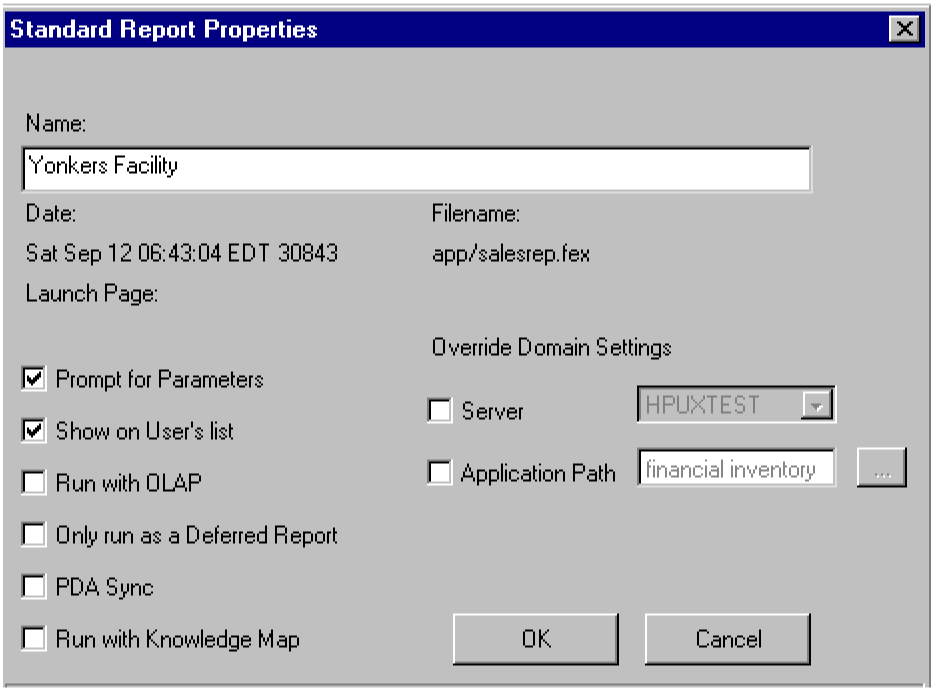
You can use the Standard Report Properties dialog box to review the date the report was created and the file name for the report. You can use the Properties dialog box to change a server and an application. You can also use the Standard Report Properties dialog box to:

- Change the name of the Standard Report.
- Select *Prompt for Parameters*.
- Select *Show on User's list*.
- Select *Run with OLAP*.
- Select *Only run as a Deferred Report*.
- Select *PDA Sync*.
- Select *Run with Knowledge Map*.

Procedure How to View Standard Report Properties

1. Expand the domain that contains the Standard Report you want to review.
2. Expand the Standard Reports folder and then expand the Standard Reports group folder that contains the Standard Report.
3. Select the Standard Report you want to review

4. Click *Properties*. The Standard Report Properties dialog box opens:



This dialog box lists the name of the Standard Report, the date the Standard Report was created, the file name for the Standard Report, and the HTML launch page that can be used to run the Standard Report.

5. To:

- Change the Standard Report name, enter a new name in the Name input box.
- Select dynamic prompting, check the *Prompt for Parameters* check box.
- Display as a Standard Report in the user environment (Domains and HTML User), check the *Show on User's List* check box.
- OLAP-enable the report, check the *Run with OLAP* check box.
- Only run the report in deferred mode, check the *Only run as Deferred Report* check box.
- Publish a Standard Report for PDA Sync, check *PDA Sync*.
- Specify a report as a source report, check *Run with Knowledge Map*.
- Select a server, check the *Server* check box, and select a server from the drop-down list.

- Select an application, check the *Application Path* check box and click the ... button. A window appears that lists the applications from which you can choose. Select an application by clicking it. The application appears in the box next to Application Path.

Note:

- You can change any of these properties at any time, with the exception of the Master File if you created the report using an assist tool. If you click *Save As*, the properties window appears and the Files button is disabled.
- This feature is used in conjunction with the Windows Mapping Tool. For more information, see the *WebFOCUS Managed Reporting Development and Administration Developer Studio Edition* manual.

6. Click *OK* to save your changes or click *Cancel* to discard your changes.

Procedure How to Run a Standard Report

1. Expand the domain that contains the Standard Report you want to run.
2. Expand the Standard Reports folder and then expand the Standard Reports group folder that contains the Standard Report.
3. Select the Standard Report you want to run.
4. Click *Run* to execute the Standard Report and receive the report output in a new instance of your browser window.
5. After you review the report output, you can use the browser functions to save the output to an HTML file or to discard the output and close the browser window.

Applying Predefined StyleSheets to a Report

Report Assistant allows you to set various styling options to enhance the look of your report. From Report Assistant, you can set the styling for the font, font style, font size, text color, and text background color for the following report components:

- Title, data, or both of an individual report column.
- Title, data, or both of all report columns.
- Data in a column that meets a screening condition (conditional styling).
- Text in a report heading.
- Text in a report footing.
- Entire report including all column titles, column data, heading text, and footing text.

You make your styling selections from one of Report Assistant's Style dialog boxes. You access a Style dialog box in one of the following ways:

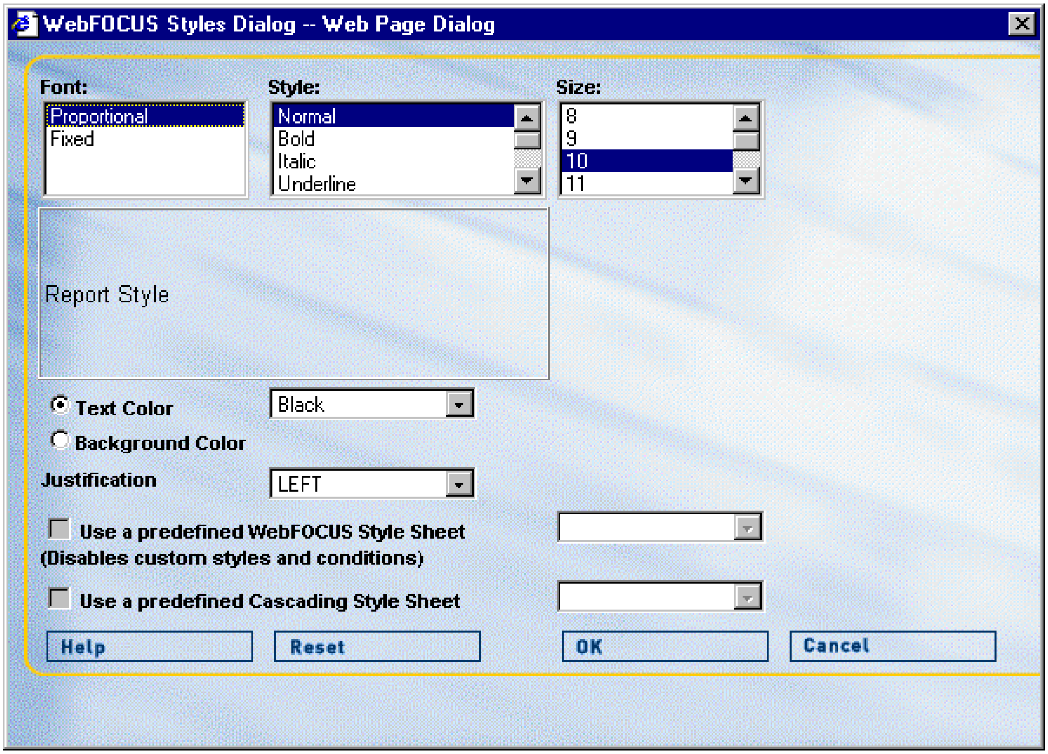
Styles for Field	From the Field Options dialog box, select a field and click *Field*.
Styles for All Fields	From the Field Options dialog box, click *All Fields*.
Font (Conditional Styling)	From the Conditional Styling dialog box, define a condition, then click *Font*.
Report Style	From the Report Options tab, click *Report Style*.

Note: You can also style Headings and Footings from the Headings tab in Report Assistant. You can use the toolbar to set font properties and text and background color.

Each Style dialog box displays the customizable styling options you can set for that report component and the Style Example dialog box. The Style Example dialog box reflects the current style settings for the report component. As you make your styling selections, Report Assistant creates a StyleSheet that it applies to the report. A StyleSheet is a special set of instructions generated by Report Assistant to control the styling of the report.

You can select a predefined StyleSheet or a Cascading StyleSheet from Report Assistant, instead of applying custom styling. A predefined StyleSheet or a Cascading StyleSheet is a StyleSheet that a WebFOCUS Administrator creates or imports and stores in a WebFOCUS domain's Other Files folder. Any user who then accesses Report Assistant from the domain can apply the StyleSheet to their report.

You apply a StyleSheet to a report from one of Report Assistant's Style dialog boxes. The following screen shows the Report Style dialog box.



In addition to the customized styling options offered, the dialog box includes the Use a predefined WebFOCUS Style Sheet check box and its corresponding drop-down list. This dialog box also includes the Use a Predefined Cascading Style Sheet check box and its corresponding drop-down list. To apply a predefined StyleSheet to a report, you click the check box and select a StyleSheet from the drop-down list. The drop-down list includes all StyleSheet files stored in the domain.

If you apply a predefined StyleSheet to a report, Report Assistant disables all customizable styling options and does not apply any previous styling selections for the entire report. These settings are not lost. If you decide not to apply the predefined StyleSheet, Report Assistant restores the report's original styling settings and allows you to further customize a report's styling.

Adding a StyleSheet to a Domain

To make predefined StyleSheets available from Report Assistant, an administrator must add one or more StyleSheet files (.sty) or Cascading StyleSheets (.css) to a domain's Other Files component. You add a StyleSheet file to this component in the following ways:

- From the Other Files component, access the WebFOCUS Editor. Using the WebFOCUS StyleSheet syntax, code your StyleSheet in the editor and save it to the Other Files component as a style file or a cascading style file. When you save the file, select the Show as Predefined Style option, so you or the user can apply the StyleSheet from Report Assistant. For more information on StyleSheet syntax, see the *Creating Reports With WebFOCUS Language* manual.
- Import a StyleSheet file into the Other Files component. For more information on importing files, see *How to Import Files Into the Other Files Folder* on page 2-32.

Report Assistant lists the StyleSheet descriptions (not the actual file name) stored in the Other Files component in the predefined StyleSheet drop-down list.

Predefined StyleSheet Syntax

When you or a user applies a predefined StyleSheet to a report, Report Assistant generates the following syntax and appends it to the report:

```
ON TABLE SET STYLE *
-INCLUDE stylesheet.sty or stylesheet.css
END
```

where:

stylesheet.sty

Indicates the StyleSheet selected from the predefined WebFOCUS StyleSheet drop-down list.

stylesheet.css

Indicates the StyleSheet selected from the predefined Cascading StyleSheet drop-down list.

Example Applying a Predefined StyleSheet to a Report

Before a user can apply a predefined StyleSheet to a report, a WebFOCUS Managed Reporting Administrator must add StyleSheet files to a domain's Other File component.

1. Open Report Assistant.
2. If you are creating a new report, use the Fields tab to add fields to your report.
3. Access one of the Report Assistant's Style dialog boxes.

4. Click the *Use a Predefined WebFOCUS StyleSheet* or *Use a Predefined Cascading StyleSheet* style check box.

   Report Assistant disables all customizable styling options.

5. Select the predefined StyleSheet you want to apply to the report from the StyleSheet drop-down list.

6. Click *OK* to accept your choice.

7. To check the output generated by your selections, click *Run* from any tab.

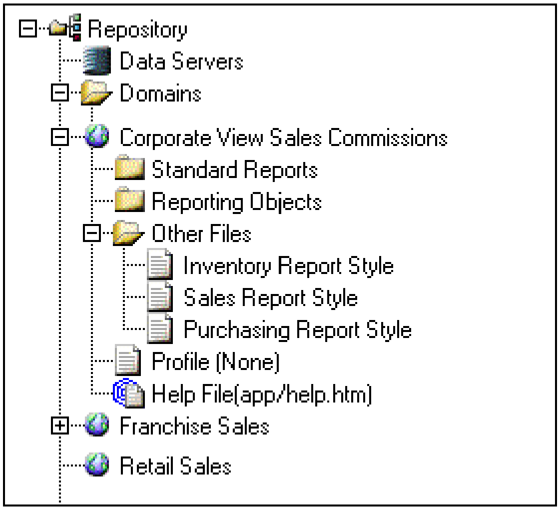
   WebFOCUS opens a new browser window displaying the report output. Close this window to return to Report Assistant.

8. To accept the current Report Assistant settings, click *Save* from any tab.

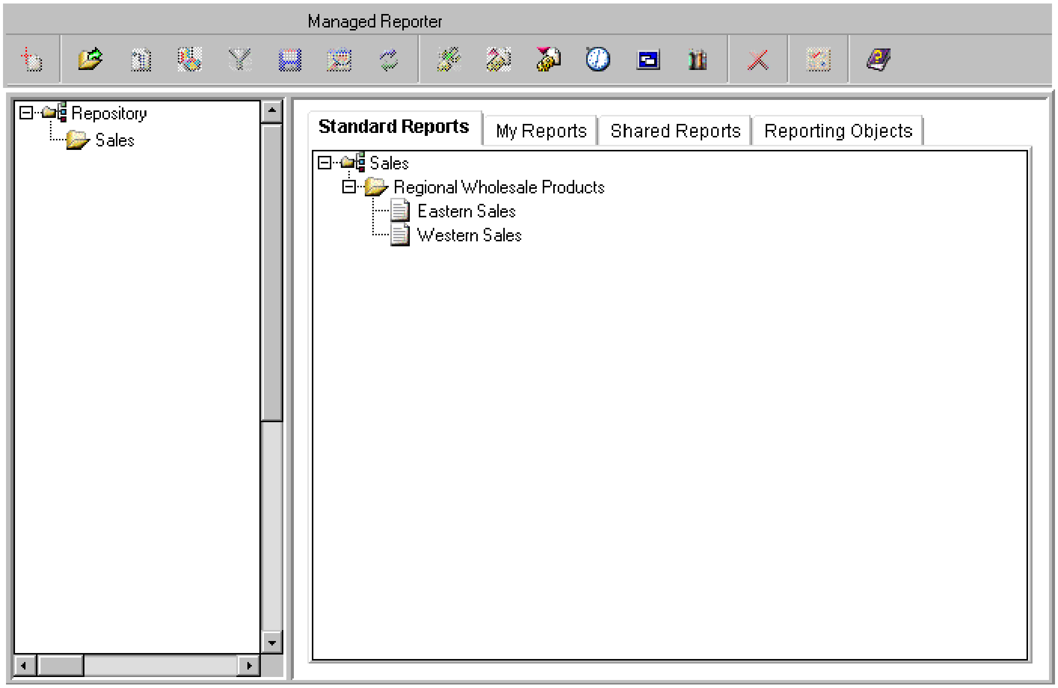
9. If you created a new report, you are prompted to enter a descriptive name for the report in the Save dialog box, then click *OK* to store the report in the domain.

Example Working With Predefined StyleSheets

As an administrator, you have created the Corporate View Sales Commissions domain and added the Inventory Report Style, Sales Report Style, and the Purchasing Report Style StyleSheets to the Other Files component. As part of your company's report style guidelines, any user who creates an inventory, sales, or purchasing report must apply the associated StyleSheet to the report. Applying the appropriate StyleSheet ensures that reports of the same category have the same styling.



A user that has access rights to the Sales domain, logs into WebFOCUS, opens the Sales domain, and switches to the Reporting Objects tab to create a sales report.



The user selects the Sales reporting object and accesses Report Assistant. From Report Assistant, the user adds fields and a report heading. To style the report, the user must apply the Sales Report Style predefined StyleSheet. The user switches to the Options tab and clicks the *Report Style* button.

In the Report Style dialog box, the user clicks the *Use a predefined WebFOCUS Style Sheet* or *Use a predefined Cascading StyleSheet* check box and selects Sales Report Style from the StyleSheet drop-down list. Report Assistant disables all customizable styling options.

The drop-down list contains the same StyleSheet descriptions that you added to the domain's Other Files component.

When the user runs the report, WebFOCUS applies the predefined StyleSheet to the report and the output generated is consistent with your corporate standards.

Deferred Receipt

You can submit Standard Reports to WebFOCUS using Deferred Receipt. When you request to run a Standard Report in deferred mode, WebFOCUS submits the request and displays a notification in a new browser window to inform the user that the request was submitted successfully.

The Deferred Report Status Interface enables you to obtain information about deferred reports. You can open this interface to view the status of deferred reports at any time by selecting the Deferred Status option. From this interface, you can perform the following actions on a deferred report:

- View deferred report output.
- View the number of days remaining prior to expiration (deletion) on the server.
- Sort deferred report output by date, description, domain, and server ID.
- Specify a sort order of ascending or descending.
- Delete a deferred report from the WebFOCUS Reporting Server.
- Save the report output as a My Report.
- Review or change parameters associated with a deferred report.
- Terminate a deferred request that is in the deferred report queue.
- Terminate a deferred report that is executing.

Submitting a Standard Report as a Deferred Report

You can submit a Standard Report for Deferred Receipt as you create it by clicking the Run Deferred button from Report Assistant. You can also select an existing Standard Report and submit it in deferred mode by following the procedure below.

Procedure How to Submit a Standard Report as a Deferred Report

1. Expand the domain with which you want to work.
2. Select the Standard Report.
3. Click *Run Deferred*, or right-click and select *Run Deferred* from the pop-up menu.

   A new browser window opens to display notification of successful or unsuccessful submission of the Deferred Report.
4. Close the browser window displaying the notification message.

   You return to Domain Builder. You can check the status of the Deferred Report by selecting the *Deferred Status* icon in the toolbar.

Designating a Standard Report as Deferred Receipt Only

Administrators and Domain Admins can designate that a Standard Report only run in deferred mode. When a user selects a Standard Report that can only run in deferred mode, WebFOCUS disables the *Run* option.

Procedure How to Designate a New Standard Report as a Deferred Report Only

1. Expand the domain with which you want to work.
2. Select a Standard Reports group folder.
3. Right-click and select *New Standard Report* or click the *New Standard Report* icon in the toolbar.
4. Click *Report Assistant, Graph Assistant*, or *Editor* to begin building a Standard Report. The New Standard Report properties dialog box opens.
5. Enter a descriptive name for the report or graph in the Name input box.
6. Click *File* to access the Master File list.
7. Select the Master File with which you want to work and click *OK*.
8. Check *Only run as a Deferred Report*.
9. Click *OK*. The Report Assistant, Graph Assistant, or Editor opens. Create your report and click *Save* and then *Quit*. You return to Domain Builder.

Procedure How to Designate an Existing Standard Report as Deferred Receipt Only

1. Log on to WebFOCUS as an Administrator or Domain Admin.

   The Domain Builder opens.
2. Expand the domain with which you want to work.
3. Select a Standard Report.
4. Right-click and select *Properties* or click the *Properties* icon in the toolbar.

   The Standard Report Properties dialog box opens.
5. Check *Only run as a Deferred Report*.
6. Click *OK*.

   When a user highlights the Standard Report, the Run Deferred button is active, and the Run button is disabled.

Checking the Status of Deferred Receipt Standard Reports

When you submit a request for Deferred Receipt, WebFOCUS returns a confirmation that displays in a new browser window. The Run Deferred Notification window displays to notify you that a request has been successfully submitted for Deferred Receipt. You close the browser window displaying the confirmation message to return to Domain Builder.

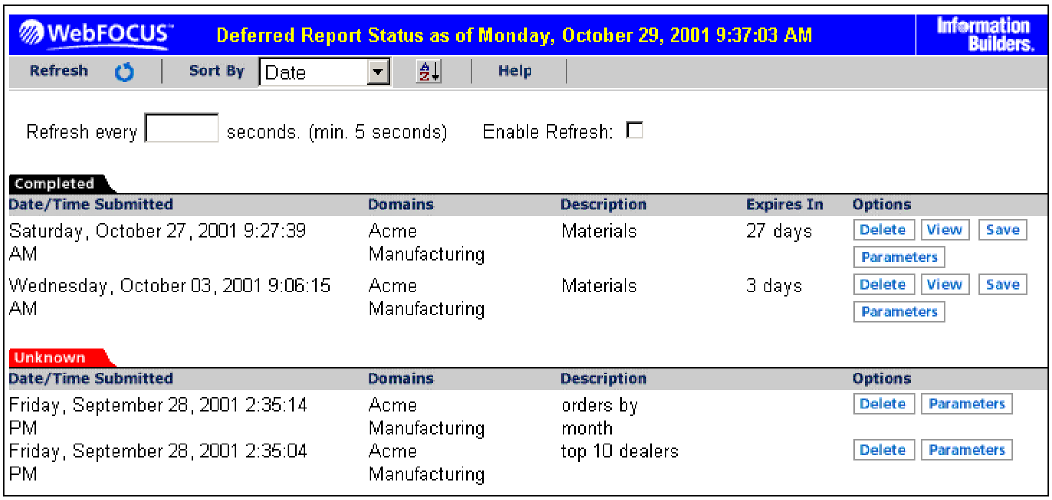
You can access information on the status of deferred requests submitted to the WebFOCUS Reporting Server from Domain Builder, as well as the Domains view, by selecting the Deferred Status option .

The Deferred Report Status Interface opens in a separate browser window. If you minimize the browser window and then log out of WebFOCUS, the browser window remains open. If you then maximize the browser window and select an option, you receive a notification that your user ID has expired. This is because WebFOCUS clears security information when you log out of Managed Reporting.

Deferred Report Status

The status of deferred requests are organized under the following sections within the interface:

- **Completed.** Indicates that the Deferred Receipt request has finished processing.
- **Running.** Indicates that the Deferred Receipt request is processing.
- **Queued.** Indicates that the Deferred Receipt request is queued.
- **Unknown.** Indicates that the Deferred Receipt request cannot be identified. This can occur when the file containing the deferred report results cannot be found.



Column headings provide information about the Standard Report including the date and time the Standard Report was submitted, the domain of origin, a description of the report (the report name), an expiration feature, and an Options heading for user options within the Deferred Report Status Interface.

Administrators should be aware that there is a dual level of security associated with Deferred Receipt. When a user selects the Deferred Status option, the status for all the deferred requests submitted by the WebFOCUS Managed Reporting user ID is obtained from the WebFOCUS Reporting Server. A user can view the status of all the deferred requests submitted by the WebFOCUS Managed Reporting user ID, but can only delete, view, save, stop, or review parameters for deferred requests submitted with an identical WebFOCUS Reporting Server user ID. Therefore, to preserve security, we recommend that users be assigned unique Managed Reporting user IDs.

The Options available in the Deferred Report Status Interface are based upon the status of the report request and security validation. A user can perform various functions by clicking the buttons under Options:

- **Delete.** Available for all report status categories. The Delete option deletes the deferred request according to the report status, as follows:
  - **Queued.** When a deferred request is listed in the Queued tab, the Delete option removes the deferred report from the WebFOCUS Reporting Server and deletes the deferred request ticket from the WebFOCUS Repository.
  - **Unknown.** When a deferred request is listed in the Unknown tab, the Delete option deletes the deferred request ticket from the WebFOCUS Repository.
  - **Completed.** When a deferred request is listed in the Completed tab, the Delete option removes the report from the screen, deletes the deferred report results from the WebFOCUS Reporting Server, and deletes the deferred request ticket from the WebFOCUS Repository.
  - **Running.** When a deferred request is listed in the Running tab, the Delete option deletes the deferred request ticket from the WebFOCUS Repository and cancels the job on the WebFOCUS Reporting Server.
- **View.** Available when the report status is completed.

  The View option displays the completed report in a new browser session, or the report format may result in the opening of a Windows dialog box that prompts the user to save the report to disk or open the report within an application (Microsoft Excel, Microsoft Word, Adobe Acrobat).

- **Save.** Available when the report status is completed.

  The Save option saves the report to a special folder, Deferred Reports Output, in the Domains My Reports tab. The description of the My Report is the description that displayed in the Deferred Report Status Interface, along with the date and time the My Report was created.

  Note: This option is not displayed for users with Run-only or HTML User privileges. Run-only and HTML Users cannot save report results to the Managed Reporting Repository.

- **Parameters.** Available when the report status is completed or queued. The parameters option allows a user to review or change report variables.

  Note: Changing report variables generates a new report that does not overwrite the original request.

Under certain circumstances, WebFOCUS is unable to submit the request to run in deferred mode. This can occur, for example, when the WebFOCUS Reporting Server is unavailable. When WebFOCUS is unable to submit a deferred request, a Deferred Receipt Notification window opens, notifying the user of the failure.

Adding a Uniform Resource Locator

In addition to listing reports and graphs in a report group folder, you can also add a hyperlink to other Web pages inside your organization or to Web sites outside your organization. Adding a hyperlink to a group folder enables you to access Web resources quickly, without having to leave Domain Builder. WebFOCUS opens another browser window and displays the Web page associated with the Uniform Resource Locator (URL).

In the Domains and HTML User views, you can enable users to access these hyperlinks using a Domain's Standard Reports.

Procedure How to Add a URL to the Domains View

1. Select the Standard Reports group folder and click the *New* icon in the toolbar.

   The New Standard Report selection dialog box opens.

2. Click *URL*.

   The New Standard Reports Group dialog box opens.

3. Enter a descriptive name for the URL in the Name input box. End users see this name on the Domain's Standard Reports tab.

4. Enter the URL for the Web page in the URL input box. For example,

   ```
   webserver/ibi_html/ggdemo/default.htm
   ```

5. If you want the description to appear on the Domain's Standard Reports tab for users to access, click *Show on User's List*.

   If you do not check this box, the description appears below its Standard Reports group folder, where only the Administrator can access the URL.

6. Click *OK* to save the description and the URL.

Importing Procedures and Other Files Into WebFOCUS

WebFOCUS allows you to use existing FOCUS procedure files as Standard Reports in your WebFOCUS domains. You copy a procedure file, created in any platform and version of WebFOCUS, into a Repository's or Domain's Import directory. You then add the procedure file to a Standard Reports group folder through the New Standard Report dialog box.

When you click Add in the dialog box, WebFOCUS retrieves the procedure files in the Repository's or Domain's Import directory and displays them in the Add Files dialog box. It is from this list of files that you choose which ones to import.

Note: Files placed in the Repository's Import directory are accessible to every domain, while files placed in a Domain's Import directory are available to only that domain.

Procedure How to Import a Procedure File to Be Used As a Standard Report

1. Locate the procedure file you want to import and copy it into either the Repository's or the Domain's Import directory.

   The Repository, the Domain directory, and the Repository's Import directory reside in the /*install_directory*/basedir directory. The Domain's Import directory resides in the Domain directory. The name of the Domain directory appears as only the first eight characters of the domain's description.

2. Launch WebFOCUS Managed Reporting and access Domain Builder.
3. Open the domain to which you want to add the file.
4. Select a Standard Reports group folder, then click the *New Standard Report* icon in the toolbar or right-click the group folder and choose *New Standard Report* from the pop-up menu.

   The New Standard Report dialog box opens.

5. Click *Add*.

   The Add Files dialog box opens.

6. Select the procedure file you want to import from Select Files to Add.
7. Click *Add*.

   To add all the files, click *Add All*. WebFOCUS adds the procedure to the Standard Reports group folder and returns you to Domain Builder.

Other Files

In addition to FOCUS procedure files, application component files (.fex, .gif, .sty, .htm) can be added to the WebFOCUS Repository or a domain component through the use of the Other Files component. For more information on adding StyleSheets (.sty), see *Applying Predefined StyleSheets to a Report* on page 2-20.

You use the Other Files component to list the application components stored in the Repository's or a Domain's Import directory. (See *Working With the Server and Application Path Properties* on page 2-5, for more information about these directories.) As with procedure files, any other files placed in the Repository's Import directory are accessible to every domain, while a file placed in a Domain's Import directory is available to only that domain.

Procedure How to Import Files Into the Other Files Folder

1. Locate the existing procedure file or application component file (.fex, .gif, .sty, .htm) that you want to add to the Other Files folder and copy it into either the Repository's or the Domain's Import directory.

   The Repository, the Domain directory, and the Repository's Import directory reside in the /*install directory*/basedir directory. The Domain's Import directory resides in the Domain directory. The name of the Domain directory appears as only the first eight characters of the domain's description.

2. Launch WebFOCUS Managed Reporting.
3. From Domain Builder, open Open the domain in which you want to add the file.
4. Select the Other Files folder, then click the *New* icon in the toolbar. Alternatively, you can right-click the Other Files folder and select *New Other Files*.

   WebFOCUS opens the New Other File dialog box.

5. Click *Import External Files*.

   The Add Files dialog box opens and displays the contents of the Repository's and the Domain's Import directory.

   Tip: You can also right-click the *Other Files* folder and select *Add Files* from the pop-up menu.

6. Select the files you want to add to the domain from Select Files to Add.
7. Click *Add*.

   To add all the files, click *Add All*. The Add Files dialog box closes and returns you to Domain Builder. WebFOCUS displays the files under the Other Files folder.

8. To copy HTML or procedure files into a Standard Reports group folder, select the newly added procedure files under Other Files, then click the *Cut* or *Copy* icon in the toolbar.

Note: Other application component files (.gif, .sty, .htm) must remain in the Other Files folder.

9. Open the component folder and select the group folder to which you want to add the selected procedure files.

10. Click the *Paste* icon in the toolbar.

WebFOCUS adds the procedure files to the group folder. In the Domains view, these Standard Reports can now be accessed from the Standard Reports tab.

11. To prevent WebFOCUS from displaying a particular file on the Standard Reports tab in the Domains and HTML User view:

- **a.** Select the procedure file from the group folder.
- **b.** Click the *Properties* icon in the toolbar.
- **c.** Deselect *Show on User's List*.
- **d.** Type a new description for the procedure file in the Name input box.
- **e.** Click *OK*.

Ignoring Code in a FOCEXEC

You can instruct WebFOCUS Managed Reporting to not process single lines or blocks of FOCEXEC code with the -MRNOEDIT tag.

Syntax How to Ignore Code in a FOCEXEC

To instruct Managed Reporting to not process FOCEXEC code, use the following:

- For a single line of code:

```
-mrnoedit focexec_code
```

- For multiple lines of code:

```
-mrnoedit begin
focexec_code
-mrnoedit end
```

Note: The *focexec_code* must fit on the same line.

The syntax above is not part of the FOCUS language. It is used only by Managed Reporting installed on the Web server.

Managed Reporting will not process the lines when evaluating the Managed Reporting procedure prior to sending it to the WebFOCUS Reporting Server. The lines of code will be passed without the MRNOEDIT tags to the WebFOCUS Reporting Server.

By design, amper variables specified within the MRNOEDIT tags are resolved by Managed Reporting. You should uncheck the procedure property, Prompt for Parameters, if you do not want to be prompted for parameter values when:

- Running a procedure immediately.
- Running a procedure deferred.
- Scheduling a procedure.

Example Using Lowercase and Uppercase Syntax With MRNOEDIT

Both lowercase and uppercase syntax are supported for the MRNOEDIT tag.

```
-mrnoedit -INCLUDE SERVDEF
```

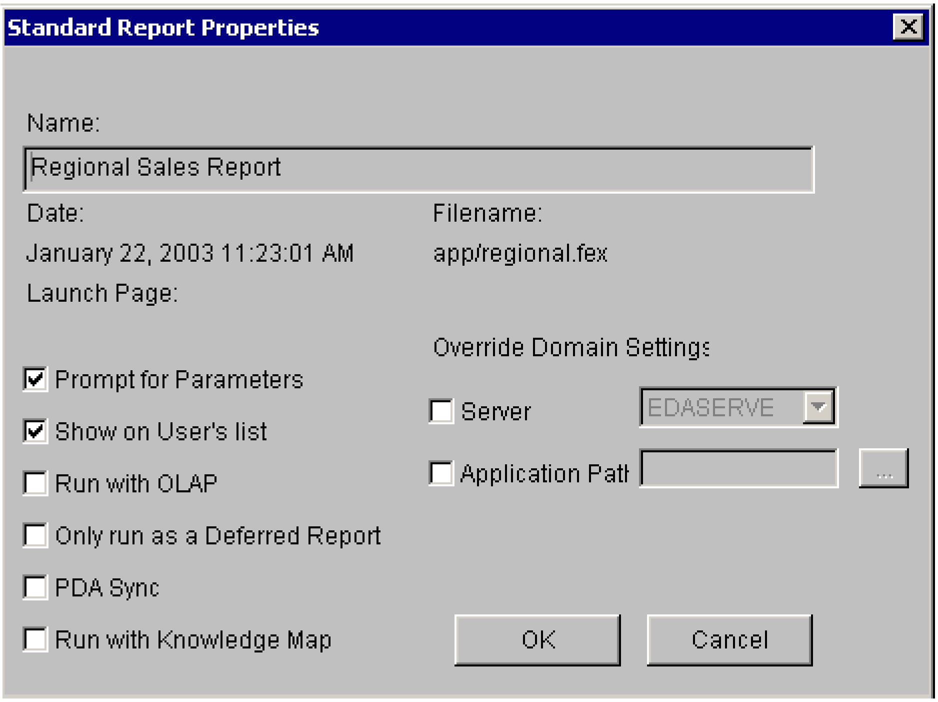
Managed Reporting does not edit the –INCLUDE SERVDEF and does not try to resolve the retrieval of the FOCEXEC from the Managed Reporting Repository. In this case, the –INCLUDE is resolved on the WebFOCUS Reporting Server. Therefore, SERVDEF.FEX should reside on the path of the WebFOCUS Reporting Server.

```
-mrnoedit begin
TABLE FILE CAR
SUM SALES
BY COUNTRY
-INCLUDE CNTVAL
END
-mrnoedit end
```

Managed Reporting will not dynamically edit the code within the –MRNOEDIT tags. The code will be passed to the WebFOCUS Reporting Server without the –MRNOEDIT tags and the WebFOCUS Reporting Server will resolve the –INCLUDE as a remote procedure.

Execution of a Managed Reporting Procedure Using -INCLUDE

When you name a Standard Report, the name displays as the description in Managed Reporting. Managed Reporting creates the actual file name, however, it does not include underscores or special characters. The properties of a Standard Report will display the file name created by Managed Reporting. This is the value to specify when referencing the Standard Report in a -INCLUDE.



Execution of a Server Procedure

To execute a FOCEXEC that resides outside Managed Reporting but on the path of the WebFOCUS Reporting Server, you must use:

```
-REMOTE BEGIN
EX focexec
-REMOTE END
```

or

You can use -INCLUDE *focexec_name* within a Managed Reporting based report using the MRNOEDIT tag.

For more information, see *Ignoring Code in a FOCEXEC* on page 2-33.

Passing Parameters in Managed Reporting

Managed Reporting does not support the passing of variable values directly on the call to execute a FOCEXEC. For example:

```
EX fexname var='value'
```

To pass variable values to a Managed Reporting procedure, first initialize the variable with a -SET, and then execute the FOCEXEC. For example:

```
-SET &var='value'
EX fexname
```

Managed Reporting will retrieve the procedure code, package it with the -SET command and submit it to the WebFOCUS Reporting Server for execution.

Customizing Managed Reporting

As a Managed Reporting Administrator, you can use Domain Builder to customize Managed Reporting for user access. You can use the following standard domain components to customize the user's reporting environment:

- **Profile.** A profile runs each time a user accesses a domain in Managed Reporting. A profile can be used either to run a procedure when the user opens a Managed Reporting domain or to display an HTML file that contains introductory information about the Managed Reporting domain that the user is accessing.
- **Customized Help Files.** This component specifies an HTML help file that users can access from the Managed Reporting domain. This HTML file can provide additional information, such as detailed explanations of Standard Reports and Reporting Objects, specific to the Managed Reporting domain.

When you create a new Managed Reporting domain, WebFOCUS automatically creates the Profile and Help components. These components appear below the Domain folder in the Domain Builder window.

Using Domain Profiles

WebFOCUS executes the profile associated with a domain each time a user opens a Managed Reporting domain. You create a domain profile by either writing a WebFOCUS procedure (.fex) or defining an HTML page (.htm). For example, you can write a WebFOCUS procedure that displays a report or defines an HTML page that displays company information each time a user opens a particular domain. The profile is not run each time a user submits a request to the WebFOCUS Reporting Server.

In addition to creating a new profile, you can import an existing procedure to the Managed Reporting Repository to use as a domain profile. You can import a procedure, created on any platform and version of WebFOCUS, using the Other Files folder to add the profile to the selected domain.

To use the Other Files folder to import a profile, you must first add the profile to the domain's Import directory, then include the profile in the Other Files folder. After you have added the profile to the Other Files folder, you can use the toolbar to move or copy the profile to the profile icon.

Procedure How to Add a Profile to a Domain

1. In the Managed Reporting Repository window, expand the domain to which you want to add the profile.

   Tip: Open the Other Files folder to verify that the file you want to add as the profile is listed in the directory. If the file is not listed, see *How to Import a Profile* on page 2-38 for instructions about adding files to the Other Files folder.

   Select *Profile* and then click the *New Profile* icon in the toolbar.The New Profile dialog box opens.

2. Specify the name of the file (for example, filename.htm or filename.fex) that you want as a profile or browse a list of files and select one as the domain profile.

   To browse a list of files:

   a. Click *Files* on the Profile dialog box.

      The Profile dialog box lists the contents of the domain's Import directory.

   b. Select the profile you want to add to the domain.

   c. Click *OK*.

      The Profile dialog box closes and you return to the New Profile dialog box. WebFOCUS lists the file in the File Name input box.

   d. Click *OK*.

   You return to Domain Builder. The path name for the profile is displayed (in parentheses) to the right of the Profile component.

3. To specify a new file using the Editor:
   a. Enter a name for the file in the File Name input box.

      WebFOCUS opens the Editor.
   b. Enter HTML code or a WebFOCUS procedure in the Editor.
   c. Select *Save* from the File menu.
   d. Click *OK*.

   The Profile dialog box closes and you return to Domain Builder. The path name for the profile is displayed (in parentheses) to the right of the Profile component.

Procedure How to Import a Profile

1. Use the Web server's operating system commands to copy the existing profile file into the WebFOCUS domain's Import directory.

   Note: Domain directories reside under the */install_directory/*basedir directory. You can review the domain's properties to determine the domain's directory. The name of the domain directory contains only the first eight characters of the domain's description.
2. Use Domain Builder to open the domain to which you want to add the profile.
3. Select the Other Files folder, then right-click *New Other File* and *Import External File(s)*.

   The Add Files dialog box opens and lists the contents of the domain's Import directory.
4. Select the files you want to add to the domain from the Available Files list.
5. Click *Add*.

   The Add Files dialog box closes and you return to the Managed Reporting Repository window. WebFOCUS lists the added files under the Other Files folder.
6. Select an imported file, under the Other Files folder, and click either the *Cut* or *Copy* icon in the toolbar.
7. Select the *Profile* icon, then click the *Paste* icon in the toolbar.

   The profile is added to the domain. You return to the Managed Reporting Repository window.

Procedure How to Edit a Profile

1. In the Managed Reporting Repository window, expand the domain that contains the profile you want to edit.
2. Select the *Profile* icon, then click the *Edit Source* icon in the toolbar.

   The Text Editor window opens for you to edit the profile. You can use standard text editor functions such as cut, copy, and paste to edit the profile source file.

3. Save the profile and exit the editor.

   You return to the Managed Reporting Repository window.

Note: Syntax and error checking are not performed on the profile until the profile is executed.

Procedure How to Review Profile Properties

1. In the Managed Reporting Repository window, expand the domain folder that contains the profile you want to review.
2. Select the *Profile* icon, then click the *Properties* icon in the toolbar.

   The Profile Properties dialog box opens and displays the name of the profile, the date and time it was created, and the Prompt for Parameters check box.

3. Click *OK* to close the Profile Properties dialog box.

   You return to the Managed Reporting Repository window.

Using Domain Help Files

A domain help file is an HTML file that you create to provide users with company specific information for a Managed Reporting domain. The user accesses this customized help by clicking Help in the Managed Reporting domain's tabbed dialog boxes. This HTML file can provide additional information, such as descriptions or detailed explanations of Standard Reports and Reporting Objects, specific to the Managed Reporting domain.

In addition to creating a new HTML help file, you can import an existing help file to the Managed Reporting Repository, to make them available to users. You import an HTML help file using the Other Files folder to add the help file to the selected domain.

To use the Other Files folder to import a help file, you must first add the help file to the domain's Import directory, then include the help file in the Other Files folder. After you have added the help file to the Other Files folder, you can use the toolbar to move or copy the help file to the Help File icon.

The domain Help option has been implemented with context sensitive HTML tag references. You can code the domain Help file to display information about specific Standard Reports and Reporting Objects for your users. There are also tags to allow you to provide general information for My Reports and Shared Reports. The following table lists the HTML tags you can utilize when coding the domain specific help file:

Managed Reporting Item Selected	**HTML Tag Names**
Domain description in right pane	#standardreport
Group folder or subgroup folder	#standardreport
Procedure	#app_*filename*_fex where *filename* is the actual file name stored in the domain's app/directory with special characters (such as slashes or periods) replaced with an underscore.
HTML page or URL	#http_*url* where *url* is the URL with slashes and periods replaced with underscores.
ReportCaster Output	#http_*url* where *url* is the URL with slashes and periods replaced with underscores.

Procedure How to Add a Help File

1. In the Managed Reporting Repository window, open the domain to which you want to add a help file.

   Tip: Open the Other Files folder to verify that the file you want to add as the domain help file is listed in the directory. If the file is not listed, see *How to Import a Help File* on page 2-41 for instructions about adding files to the Other Files folder.

2. Select the *Help File* icon, then click the *New* icon in the toolbar.

   The New Help File dialog box opens.

3. Enter a name for your help file in the File Name input box and click *OK*. The text editor window opens.

4. Enter the HTML code for the help file.

   You can also use standard text editor functions such as cut, copy, and paste to help create the HTML help text.

5. Save the help file and exit the editor.

The path name for the help file is displayed (in parentheses) to the right of the help component. A user can now access the help file from the domain's reporting environment.

Procedure How to Import a Help File

1. Copy the existing help file into the WebFOCUS domain's Import directory.

   Note: Domain directories reside under the */install_directory/*basedir directory. The name of the domain directory contains only the first eight characters of the domain's description.

2. Use the Managed Reporting Repository to open the domain to which you want to add the help file.

3. Select the Other Files folder, then click the *Add Files* icon in the toolbar.

   The Add Files dialog box opens and lists the contents of the domain's Import directory.

4. Select the help file you want to add to the domain from the Available Files list.

5. Click *Add*.

   The Add Files dialog box closes. WebFOCUS lists the added help file under the Other Files folder.

6. Select the imported help file, under the Other Files folder, and click either the *Cut* or *Copy* icon in the toolbar.

7. Select the *Help File* icon, then click the *Paste icon* in the toolbar.

The help file is added to the domain. You return to the Managed Reporting Repository window.

Procedure How to Edit a Help File

1. In the Managed Reporting Repository window, expand the domain that contains the HTML help file you want to edit.

2. Select the *Help File* icon, then click the *Edit Source* icon in the toolbar.

   The Text Editor window opens for you to edit the HTML help file. You can use standard text editor functions such as cut, copy, and paste to edit the HTML help file.

3. Save the HTML help file and exit the editor.

You return to the Managed Reporting Repository window.

Procedure How to Review Help File Properties

1. In the Managed Reporting Repository window, expand the domain that contains the HTML help file you want to review.
2. Select the *Help File* icon, then click the *Properties* icon in the toolbar.

   The Help File Properties dialog box opens and displays the name of the help file, the date and time it was created, and the type of data in the file.
3. Click *OK* to close the Help File Properties dialog box.

You return to the Managed Reporting Repository window.

CHAPTER 3

Creating Reporting Objects

Topics:

WebFOCUS Managed Reporting provides a streamlined reporting environment that virtually eliminates the complexities of today's corporate data by giving users a simple way to generate reports and graphs.

With WebFOCUS Managed Reporting, a Database Administrator can easily transform complex views of data into simple objects labeled with common business terminology that every user can understand, such as "Weekly Sales" or "Revenue." Users can then use these objects to create a wide range of reports and graphs by choosing from existing Reporting Objects to create, save, and use their own reports.

Reporting Objects

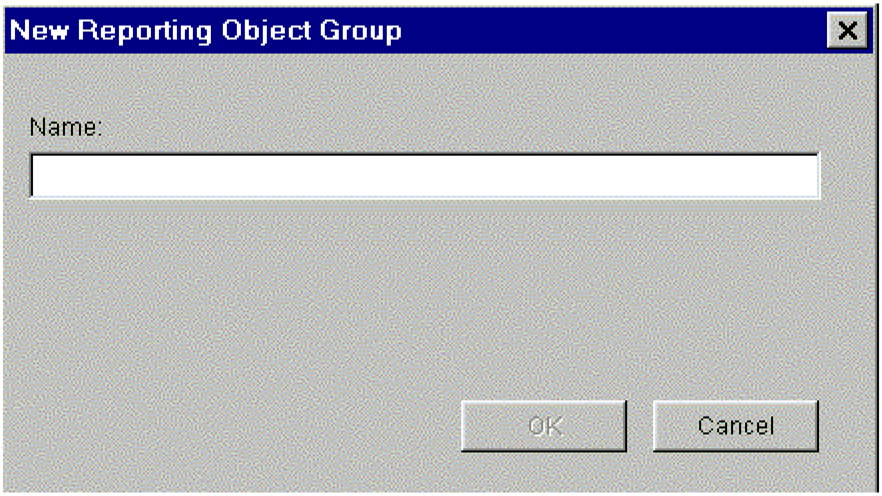
Reporting Objects are stored in the Reporting Objects folder. The Reporting Objects folder contains simple views of your organization's data that users access to create their own reports. You begin creating a Reporting Object by first defining a Reporting Object group folder. You organize the Reporting Objects under group folders.

After you define a group folder, you define one or more Reporting Objects in that folder. The Reporting Objects that you create can include selection criteria (WHEREs), JOINs, virtual fields (DEFINEs), Filters, and other FOCUS statements, as well as Reports and Graphs, which you supply as templates. You use these Reporting Object components to define the Reporting Objects that are available to the Managed Reporting user's environment.

Procedure How to Create a Reporting Object Group Folder

1. Expand the domain in which you want to add a Reporting Object by clicking the *plus sign (+)* next to the domain name.
2. Select the *Reporting Objects* folder.
3. Click *New* in the gray toolbar. Alternatively, you can right-click the Reporting Objects folder and select *New Reporting Object Group* from the menu.

   The New Reporting Object Group dialog box opens:



4. Enter the name of the Reporting Object group in the Name box.
5. Click *OK*.

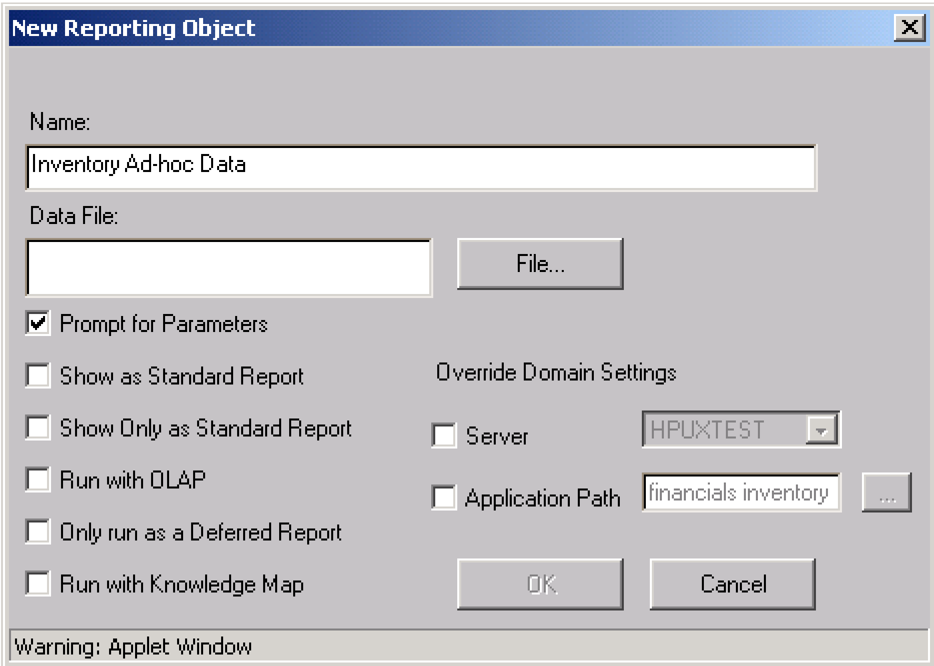
   The new Reporting Object group folder appears below the Reporting Object component folder.

Procedure How to Define a Reporting Object

Once you have defined the Reporting Object group folder, you can create the actual Reporting Object.

1. Select a Reporting Object group folder.
2. Click *New* in the gray toolbar. Alternatively, you can right-click the Reporting Object group folder and select *New Reporting Object* from the menu.

   The New Reporting Object dialog box opens:



3. Enter a descriptive name for the Reporting Object in the Name box.
4. Optionally check *Server* to choose a server from the drop-down list.
5. Optionally check *Application Path* to choose your application and override the server's default search path.
6. In the Data File box, enter the name of a data description to be associated with the Reporting Object.

   You can also click *File...* to browse the available files. Select the data description and click *OK* to return to the New Reporting Object dialog box.

7. WebFOCUS offers the following optional features when creating your Reporting Object:

    a. If you check the *Prompt for Parameters* check box, WebFOCUS prompts the user to supply a value (parameter) when the Reporting Object is used to create a My Report.

    b. If you check *Show as Standard Report*, WebFOCUS lists the Reporting Object under the Standard Reports tab in addition to the Reporting Objects tab in the Domains reporting environment. A user can then run the Reporting Object as if it was a Standard Report.

    c. If you check *Show Only as Standard Report*, WebFOCUS will only display the Reporting Object under the Standard Reports tab in the Domains environment.

    d. If you check *Run with OLAP* and you have OLAP-enabled the Reporting Object, users can run the Reporting Object using OLAP capabilities.

    e. If you check *Only run as a Deferred Report* , WebFOCUS always submits this report in deferred mode. See the *WebFOCUS Managed Reporting End User's Manual* for more information.

    f. If you check *Run With Knowledge Map*, this specifies a report as a source report. This feature is used in conjunction with the Mapping tool. For more information, see *Creating Reports With Graphical Tools*.

8. Click *OK*.

    The Managed Reporting Domain Builder displays the new group folder and Reporting Object.

    Note: You may be prompted for WebFOCUS Server credentials when you click the *File* button or *OK* button, depending on your environment.

Running a Reporting Object From Domain Builder

You can run all components of a Reporting Object from the Reporting Object window in the Domain Builder. This facilitates development by allowing Administrators to stay in the same context while building and testing components.

You run a Reporting Object by clicking Run in the Reporting Object window. The Run option in the Reporting Object window is enabled regardless of the setting of the Reporting Object's Show only a Deferred Report property.

You can also use the Run and Run Deferred buttons from the Domain Builder toolbar whenever a Reporting Object is selected. Unlike the Reporting Object window, the Run option in the Domain Builder toolbar is only available if the Reporting Object's Only run as a Deferred Report property is not selected. This enables you to run Reporting Objects from Domain Builder without having to edit them.

When selecting Run or Run Deferred, the behavior is the same as when Reporting Objects are run as Standard Reports from Domains.

Expected Behaviors of Running a Reporting Object

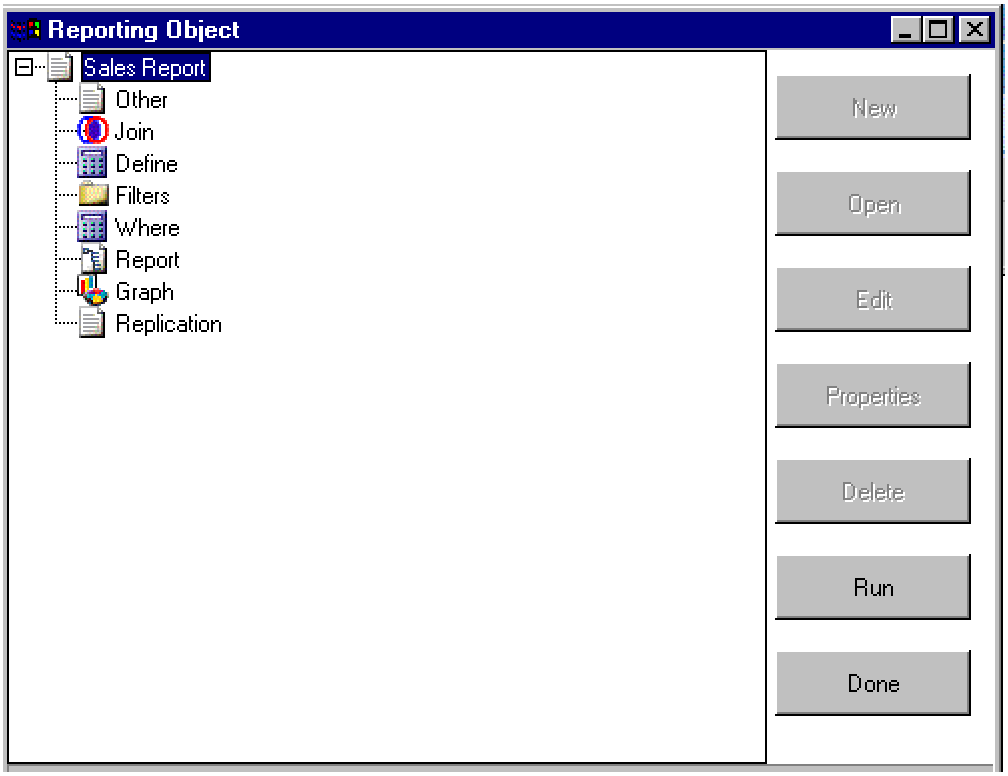
When you select and run a Reporting Object, the expected behavior is as follows:

- When you define a Report *or* Graph component, all components of the Reporting Object run.
- When you define a Report *and* Graph component, an HTML page displays that enables you to select which one to run.
- When you define filters in a Reporting Object, an HTML page displays that enables you to select from the defined filters of the Reporting Object.
- When you define parameters in a report or graph and the Reporting Object's Prompt for Parameters property is specified, an HTML page displays that prompts you for parameter values.
- Reporting Object components are validated prior to run time. This means that errors are found and corrected more easily since errors in individual components are detected prior to run time.

Note: Run is disabled for all the remaining Reporting Object components (Other, Join, Define, Filters, Where, and Replication).

Components of a Reporting Object

You access the components through the Reporting Object window, which WebFOCUS displays when you open a Reporting Object.



When creating Reporting Objects, you should consider what types of components you want to include. Reporting Objects can contain different components, which WebFOCUS executes in the following order: Others (procedures you code in the text editor), Joins, Defines, Filters, Where statements, Report templates, Graph templates, and Replications.

The Replication component of a Reporting Object allows a WebFOCUS Managed Reporting Administrator or Domain Admin to access the Replication tool. An Administrator uses the Replication tool to select the individual field names and to control the data values available for a WebFOCUS Developer Studio user to replicate. You can include any combination of these components in your Reporting Objects.

Users do not see the Where statements, defines, or joins you create; these are issued automatically every time a user accesses the Reporting Object. You can, however, create reports and graphs, including headers, footers, and styling features, and provide them as templates for users' reports. Users then create their own reports and graphs from the templates you specified.

Note: You must click *Done* in the Reporting Object window to save any changes you make to a component in the Reporting Object folder. If you close the dialog box in any other way, WebFOCUS will not save your work.

Other Component

Select the Other component to open the text editor, where you can define components not represented by a Reporting Object component. See the *Creating Reports With WebFOCUS Language* manual for more information about using the WebFOCUS language to code procedures.

Note: Syntax and error checking are not performed on the commands you enter until the Reporting Object is executed.

Joins

A join is a temporary connection between two or more data sources that share at least one common field. Once you join two data sources, each time WebFOCUS retrieves a record from the first data source (host file), it also retrieves the matching records from the second data source (cross-referenced file). For a full discussion about joining data sources, see the *Creating Reports With WebFOCUS Language* manual.

You use the Join Tool to link data sources. The Join Tool provides a graphical method for creating and manipulating joins. Instead of coding a join using the WebFOCUS language, you use the Join Tool to drag a field from one data source and link it to a field in another data source.

When you access the Join Tool, the window displays a field list for the data source associated with the Reporting Object (which you specified when you created the Reporting Object) and a field list for any data source you add to the window. An icon representing the data type displays before each field name in the Master File.

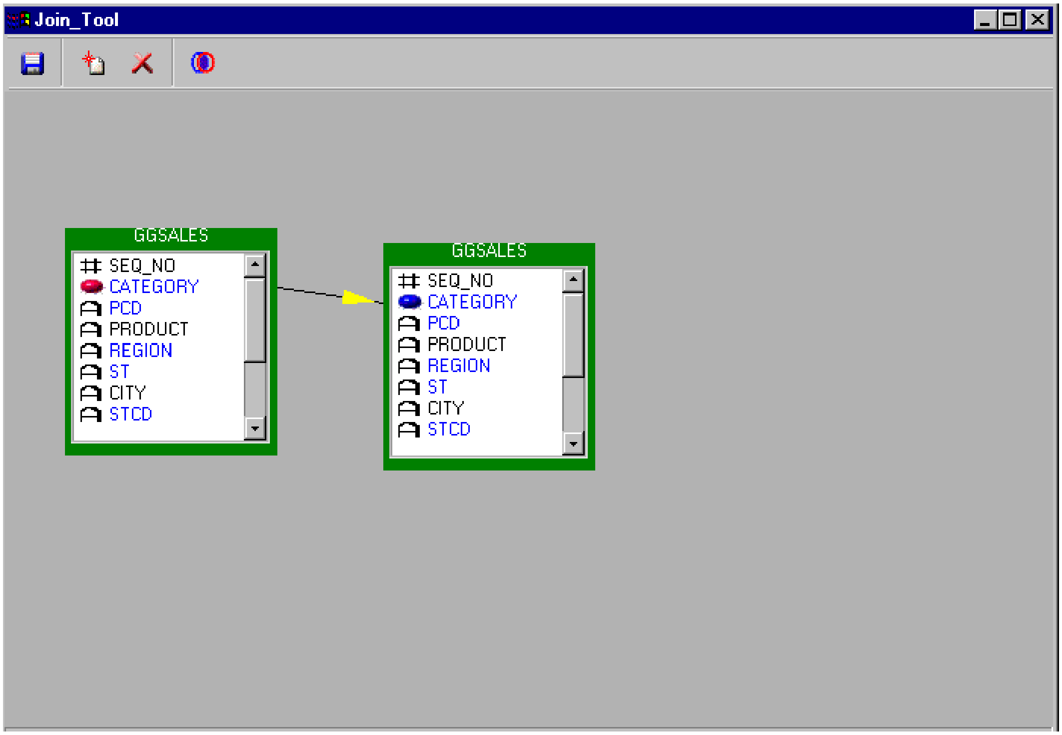
Reference Data Type Icons

The following table describes each icon:

Icon	Description
	Represents an alphanumeric data type.
	Represents a numeric data type.
	Represents a date data type.

After you have at least two data sources in the Join Tool window, you can create the links between the data sources. The data source from which you drag a field becomes the host file and the data source you link to becomes the cross-referenced file. If you are using a FOCUS data source, index field names are highlighted in blue to identify fields that are indexed.

Note: When joining two FOCUS data sources, the cross-referenced file field must be indexed.



The Join Tool represents a join by displaying a connector line with a single arrow from the field in the host file to the field in the cross-referenced file. The Join Tool also displays a red button to the left of the linked field in the host file and displays a blue button to the left of the linked field in the cross-referenced file. These buttons provide a quick way to identify host and cross-referenced files.

Note: The Join Tool does not validate syntax.

Procedure How to Create a Join

1. Expand the Reporting Object in which you want to create links between data sources.

   The Reporting Object window opens.

2. Select the *Join* component and click *Open*.

   The Join Tool window opens and displays the data source associated with the Reporting Object.

3. Click *Add Master* in the Join toolbar.

   The Add Master(s) dialog box opens.

4. Select a file and click *OK*.

   WebFOCUS adds the field list for the selected data source to the Join Tool window.

5. To link the data sources:

   a. Click and hold a field name in one data source. This file becomes the host file.

   b. Drag the field name to the field list of the other data source. This file becomes the cross-referenced file.

   c. Position the cursor over the field name you want to link in the cross-referenced file and release the mouse button.

   The Join Tool displays the connector line between the linked fields and the red and blue buttons next to the linked fields.

   To link fields other than those indicated by the Join Tool, right click the connector line and select *Delete* from the Link Properties dialog box. You can then follow the directions in Step 5 to link the fields you want.

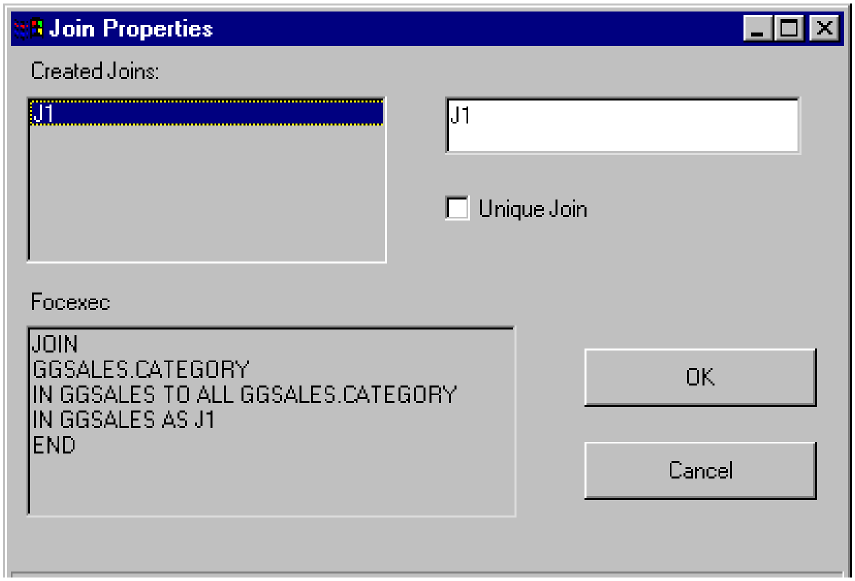
6. Close the Join Tool window to return to the Reporting Object window.

If you have finished working with the components of the Reporting Object, remember to click *Done* in the Reporting Object window to save the changes.

Note: Syntax and error checking are not performed on the commands you enter until the Reporting Object is executed.

Customizing a Join

The Join Tool assigns a unique default name to each join you create in a Reporting Object. The default names are J1 for the first join, J2 for the second, J3 for the third, and so on. You use these names to access a join's Properties dialog box.



You use the Join Properties dialog box to view the actual WebFOCUS code that defines a join, make a join unique, rename the join, or delete the join.

Procedure How to Display Join Syntax

1. Click *Join Properties* in the Join Tool window's toolbar.

   The Join Properties dialog box opens.

2. Select a join from the Created Joins list.

   The WebFOCUS code that defines the join appears in the Focexec box. You can only view this code (not edit it).

Procedure How to Make a Join Unique

1. Click *Join Properties* in the Join Tool window's toolbar.

   The Join Properties dialog box opens.

2. Select a join from the Created Joins list.

3. Click the *Unique Join* box.

   A check mark appears in the box. To make the join non-unique, click the box again.

Procedure How to Rename a Join

1. Click *Join Properties* in the Join Tool window's toolbar.

   The Join Properties dialog box opens.

2. Select a join from the Created Joins list.
3. Click *OK* in the Join Properties dialog box.

   The Link Properties dialog box opens. This dialog box is specific to the join you selected previously.

   Tip: You can also access this dialog box directly by right-clicking the arrow in the join's connector line in the Join Tool window.

4. Enter a new join name in the Name input box.
5. Click *OK*.

   The Join Tool renames the join and you return to the Join Tool window.

Procedure How to Delete a JOIN

1. Click *Join Properties* in the Join Tool window's toolbar.

   The Join Properties dialog box opens.

2. Select a join from the Created Joins list.
3. Click *OK* in the Join Properties dialog box.

   The Link Properties dialog box opens.

4. From the Link Properties dialog box, click the *Delete Link* button.

   The Join Tool deletes the link and you return to the Join Tool window. Notice that the Join Tool removed the join connector line and the red and blue buttons associated with the join.

Virtual Fields (DEFINE Statements)

A virtual field is a field whose value is not stored in the data source but can be calculated from the data that is there. A virtual field takes up no storage space; it is created only when a user accesses the Reporting Object that includes the virtual field.

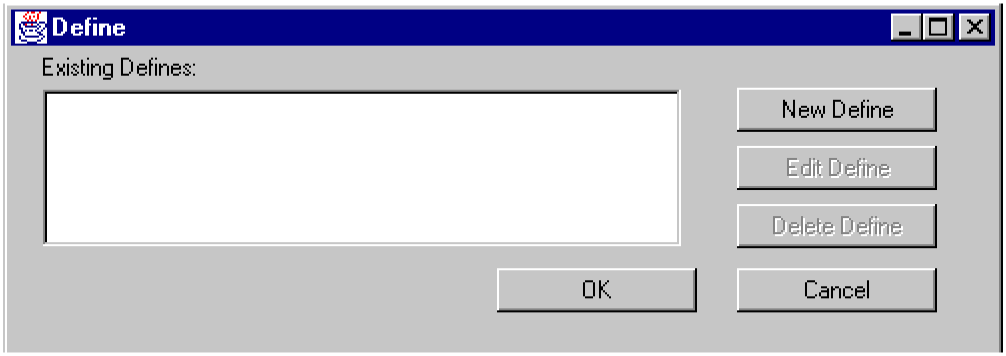
You use the Define Tool to create a virtual field. Using this tool, you specify the virtual field's name, format, and the expression that defines the field. An expression enables you to combine fields, constants, predefined functions, and operators into an operation that produces a single value. For more information about defining fields, see *Creating Reports With Graphical Tools*.

When you define a virtual field, you must specify a field format type, length, and appropriate display options.

Procedure How to Create a Virtual Field

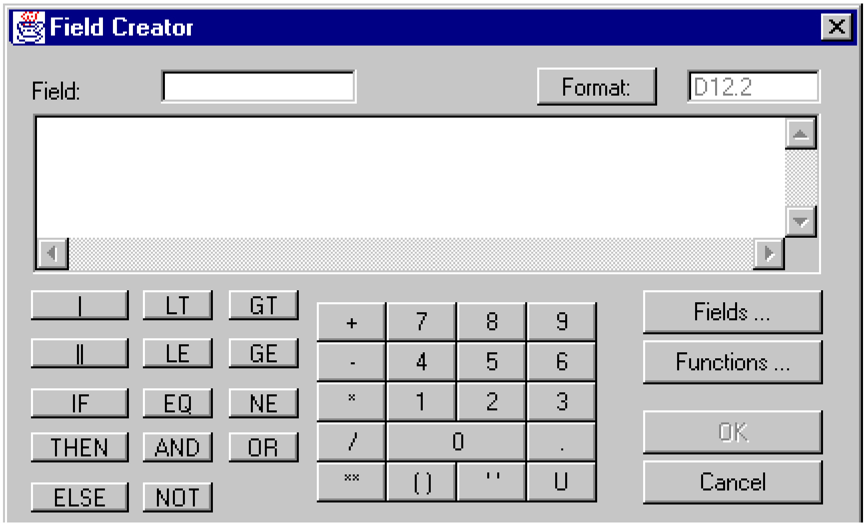
1. Expand the Reporting Object in which you want to add a virtual field.
2. Select the Define folder and click the *Open* button in the Reporting Object window.

   The Define Tool dialog box opens and displays any existing defines:



3. Click *New Define*.

   The Field Creator dialog box opens. The Fields list window opens by default whenever you access the Field Creator.



4. Enter the name of the virtual field in the Field box.

5. Enter a field format in the Format box.

   For detailed information about field formats, see *Field Formats* on page 3-14.

6. Enter the expression that defines the virtual field in the input box below the field name.
7. Click *OK* to save the virtual field, close the Field Creator, and return to the Define Tool.
8. Click *OK* in the Define Tool window to close the tool.

   You return to the Reporting Object window. The virtual field now appears in the field list when a user accesses this Reporting Object.

If you have finished working with the components of the Reporting Object, remember to click *Done* in the Reporting Object window to save the changes.

Note: Syntax and error checking are not performed on the commands you enter until the Reporting Object is executed.

Procedure How to Edit a Virtual Field

1. Expand the Reporting Object in which you want to edit a virtual field.
2. Select the Define folder and click *Open* in the Reporting Object window.

   The Define Tool dialog box opens and displays any existing virtual fields.

3. Select the virtual field you want to edit and click *Edit Define*.

   The Field Creator dialog box opens, displaying the expression for the selected field.

4. Make changes to the field's expression or format and click *OK*.

   The Field Creator dialog box closes and you return to the Define Tool.

5. Click *OK* to exit the Define Tool.

   WebFOCUS saves the change and returns you to the Reporting Object window

If you have finished working with the components of the Reporting Object, remember to click *Done* in the Reporting Object window to save the changes.

Note: Syntax and error checking are not performed on the commands you enter until the Reporting Object is executed.

Procedure How to Delete a Virtual Field

1. Expand the Reporting Object in which you want to delete a virtual field.
2. Select the Define folder and click the *Open* button in the Reporting Object window.

   The Define Tool dialog box opens and displays any existing virtual fields.

3. Select the virtual field you want to delete and click the *Delete Define* button.

4. Click *OK* to verify the deletion.

   WebFOCUS deletes the virtual field and returns you to the Reporting Object window.

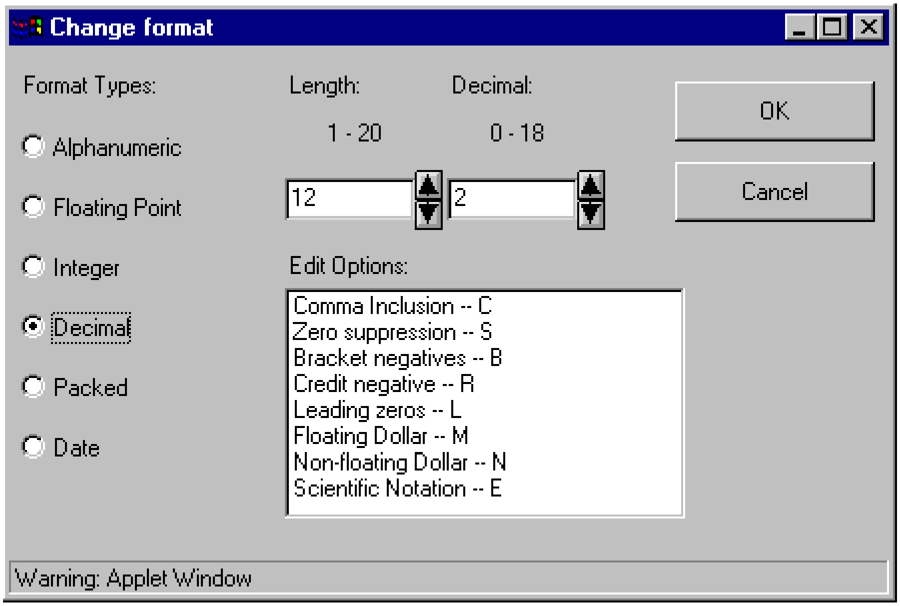
   If you have finished working with the components of the Reporting Object, remember to click *Done* in the Reporting Object window to save the changes.

Field Formats

You must specify a field format for every virtual field you create. You assign a format based on the values that the virtual field will hold. The field format specifies the following information:

- The field type, which indicates whether the field value will contain an alphanumeric, numeric, or date value.
- The field length, which determines the maximum number of positions an alphanumeric or numeric field value can contain.
- Options that affect how a numeric or date field value will appear in reports.

You can specify the format type, length, and appropriate display options in the Format input box in the Define Tool dialog box, or you can use the Change format dialog box to assist you in defining the field format.



In this dialog box, you can select a format's attributes from list boxes instead of entering the required syntax.

Procedure How to Specify a Field Format

1. Click *Format* in the Field Creator window to open the Change format dialog box.
2. In the Format Types list, select the radio button to the left of the format type you want to assign to the virtual field.

   The default length for the format type appears in the Length box.
3. If you want to change the format length, type a new value in the Length box and the Decimal box.

   Note: The Decimal box appears only for the Floating Point, Decimal, and Packed format types.
4. If the Format Type is numeric or date, specify any report display options.
   - For numeric format types, select one or more options in the Edit Options list box.
   - For the Date format type, type the display option code in the Date Format box.
5. Click *OK*.

   The Change format dialog box closes and you return to the Field Creator. The virtual field will have the field format you just specified.

   Note: Syntax and error checking are not performed on the commands you enter until the Reporting Object is executed.

Field Format Types

There are three types of field formats: alphanumeric, numeric, and date.

- **Alphanumeric.** Assigns the Alphanumeric format to values composed of any combination of alphabetic, numeric, or special characters, up to 256 characters in length. You can concatenate alphanumeric values, but you cannot perform mathematical operations on an alphanumeric field, even if the field's value is composed of numeric characters.
- **Numeric.** Assigns a numeric format to values composed of the digits 0 through 9 and a minus sign or a decimal point. You can perform mathematical operations on numeric values. There are four specific numeric formats:

Integer (I)	Integer format can consist of a maximum of 11 positions, counting the digits and an optional minus sign. Use this format for whole number values; the value cannot contain a decimal point.

Floating Point (F)	Floating Point format can consist of a maximum of 9 positions, counting the digits, a minus sign, and a decimal point. Use this format for whole numbers or fractional values. For larger numbers, use the Decimal or Packed formats.
Decimal (D) and Packed (P)	Decimal and Packed formats can consist of a maximum of 20 positions, counting the digits, minus sign, and a decimal point. Use this format for whole numbers or fractional values that are larger than the maximum value for a Floating Point value.

For numeric formats, you can also specify how the field will appear in reports. Note that the characters added by these display options count toward the maximum number of positions a field can hold. For more information on numeric format options, see the *Describing Data With WebFOCUS Language* manual.

- **Date.** Assigns the Date format to values that represent a date or date component. You can add or subtract values in the date format.

  For Date formats, you can specify how the values that represent a date or date component are stored and displayed. For more information on date format options, see the *Describing Data With WebFOCUS Language* manual

Filters

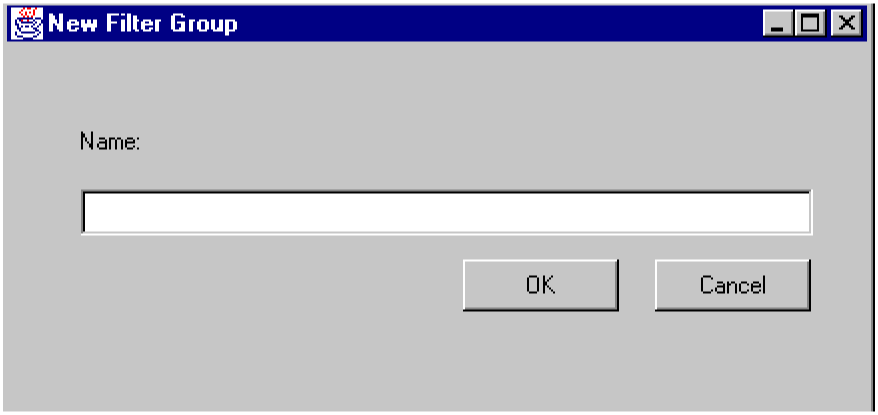
Filters enable users to quickly select predefined criteria that limit data included in a report or graph. Filters are selection criteria (WHERE statements) that you create for users, who then select the filters needed to limit the data in a report or graph, without having to create their own selection criteria.

In order to create a filter, you must create the filter group and define the filters that make up the group.

Procedure How to Create the Filter Group

1. Expand the Reporting Object to which you want to add the filter group.
2. Select the Filters folder and click *New* in the Reporting Object window.
3. Select the Filters folder and click *New* in the Reporting Object window.

The New Filter Group dialog box opens:



4. Type a descriptive name for the filter group folder in the Name box.

   You should make the filter group name as explicit as possible, because your users depend on this name to select the correct filter to apply to their reports.

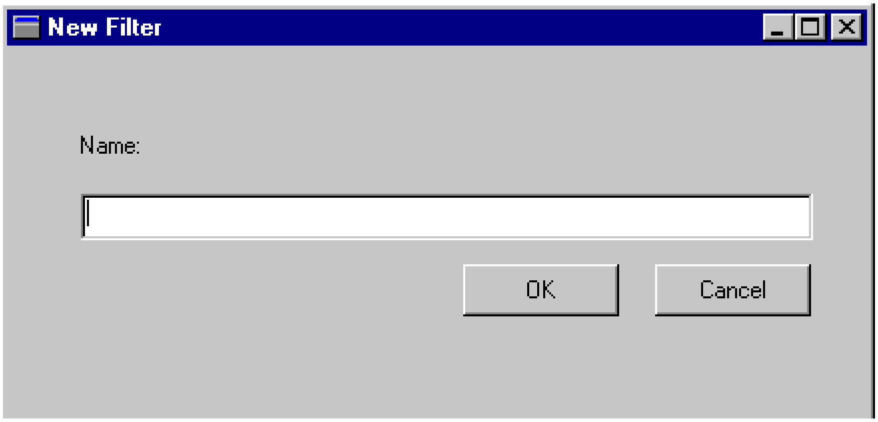
5. Click *OK*.

   You return to the Reporting Object window. The filter group folder appears below the Filter component folder.

Procedure How to Define the Filter

1. Select the filter group folder to which you want to add a filter.
2. Click *New* in the Reporting Object window.

   The New Filter dialog box opens:



3. Type a descriptive name for the filter in the Name box and click *OK*.

You should make the filter names as explicit as possible, because your users depend on these names to select the correct filter to apply to their reports.

The Expression Builder dialog box opens.

4. Use the Expression Builder to build the filter.

For details about building the filter expression, see *Using the Expression Builder* on page 3-18.

5. When you have created the filter, click *OK*.

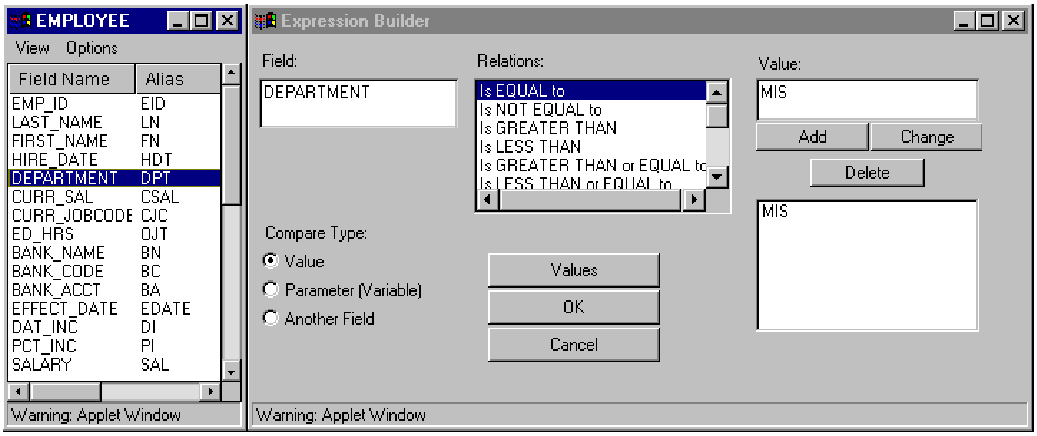
WebFOCUS saves the filter and returns you to the Reporting Object window. The new filter appears below the filter group folder.

If you have finished working with the components of the Reporting Object, remember to click *Done* in the Reporting Object window to save the changes.

Note: Syntax and error checking are not performed on the commands you enter until the Reporting Object is executed.

Using the Expression Builder

To define a filter, you use the Expression Builder dialog box to specify a field, a relational operator (for example, Is Equal to, Is Greater Than), and a Compare Type.



The Compare Type you select determines the value you enter. The filter definition compares this value to the values stored in the selected field. If the relation between the field value and the specified value is true, the field value appears in the report.

You can select one of the following Compare Types:

- **Value.** Compares a literal data value or an actual data source value to the value of the selected field.
- **Parameter (Variable).** Compares a user-entered value, passed through the variable, to the value of the selected field.
- **Another Field.** Compares the value of a data source field to the value of the selected field.

Procedure How to Build an Expression for a Filter

1. Select a field in the Fields list box.
2. Select a relational operator from the Relations box.
3. Select a Compare Type.
4. Specify a value to compare to the selected field.

   Enter a value in the Value box, or click the *Values* button to choose from a list of actual values. This value depends on the Compare Type you selected in the previous step.

If you selected...	Then ...
Value	Enter a literal value or click the *Values* button to select from a list of actual data source values for the selected field.
Parameter (Variable)	Specify the name of the variable in the Value box.
Another Field	Select a field in the Fields list box.

5. When you have created the filter, click *OK*.

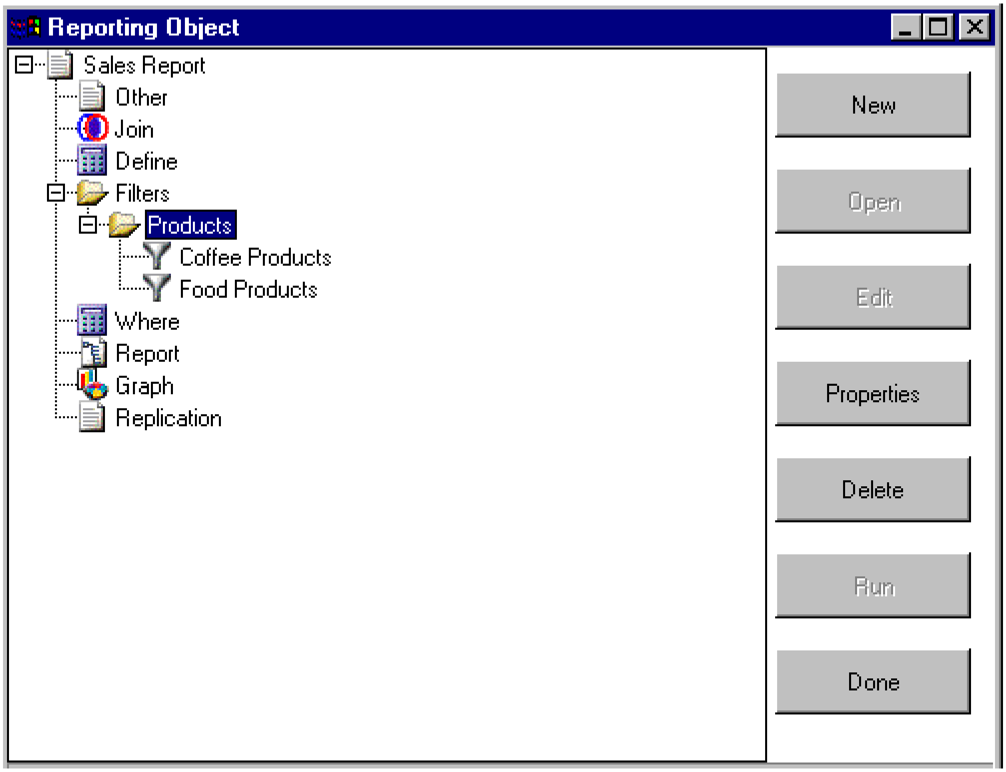
   WebFOCUS saves the filter and returns you to the Reporting Object window. The new filter appears below the filter group folder.

If you have finished working with the components of the Reporting Object, remember to click *Done* in the Reporting Object window to save the changes.

Note: Syntax and error checking are not performed on the commands you enter until the Reporting Object is executed.

Example Creating Two Filters

Your manager wants users to be able to ascertain which store products are the best sellers. Instead of defining selection criteria, which restrict the data a user can access, you will create two filters: one for coffee products and the other for food products. Users can then select either Coffee Products or Food Products to see which items sold more.



The following examples illustrate how to create these filter groups and filters. By using these examples as a guideline, you can create multiple filter groups that contain multiple filters. Your users can then combine filters from different groups to create complex selection criteria that allow only specific data in a report or graph.

Note: To perform these examples, choose a Reporting Object that accesses the ggsales data source.

Example Creating the Salary Filter Group

To define a filter group for Product filters:

1. Expand the Reporting Object to which you want to add filters.
2. Select the Filters component folder and click *New* in the Reporting Object window.

   The New Filter Group dialog box opens.
3. Enter Products in the Filter Group Name box.
4. Click *OK*.
5. A group folder labeled Products appears below the Filters folder.

Example Creating a Filter for Coffee Products

1. Select the Products folder and click *New* in the Reporting Object window.

   The New Filter dialog box opens.
2. Enter Coffee Products in the Filter Name box and click *OK*.

   The Expression Builder dialog box opens.
3. In the Expression Builder dialog box, perform the following:
   a. Select *Products* in the Fields list box.
   b. Select *Is EQUAL TO* in the Relations list box.
   c. Click *Values*. Select *Cappucino*, *Espresso*, and *Latte* and click *Add*.
4. Click *OK*.

   You return to the Reporting Object window.

   The Coffee Products filter appears below the Products group folder.

Example Creating a Filter for Food Products

1. Select the Products folder and click *New* in the Reporting Object window.

   The New Filter dialog box opens.
2. Enter Food Products in the Filter Name box and click *OK*.

   The Expression Builder dialog box opens.
3. In the Expression Builder dialog box, perform the following:
   a. Select *Products* in the Fields list box.
   b. Select *Is EQUAL TO* in the Relations list box.
   c. Click *Values*. Select *Biscotti*, *Scone*, and *Croissant* and click *Add*.

4. Click *OK*.

   You return to the Reporting Object window.

   The Food Products filter appears below the Products group folder.

Selection Criteria (WHERE Statements)

You limit the data a user can report from by defining selection criteria, which restrict data to only the records that meet conditions you specify. You use the Expression Builder to define selection criteria.

Selection criteria, like filters, limit the amount of data a user can access to build a report. When a user opens a Reporting Object that contains selection criteria, the selection criteria runs and excludes those data values that do not meet the criteria. A filter, on the other hand, runs only when a user selects the filter in the Managed Reporting Domains environment.

Procedure How to Create Selection Criteria

1. Expand the Reporting Object in which you want to add the selection criteria.
2. Select the Where folder and click *New* on the Reporting Object window.

   The Expression Builder dialog box opens.
3. Use the Expression Builder to build the selection criteria.

   For details about building the selection criteria expression, see *Using the Expression Builder* on page 3-18.
4. Click *OK* to save the selection criteria and return to the Reporting Object window.

   If you have finished working with the components of the Reporting Object, remember to click the *Done* button on the Reporting Object window to save the changes.

   Note: Syntax and error checking are not performed on the commands you enter until the Reporting Object is executed.

Example Creating Selection Criteria

Your manager wants to allow users to report only on the information relating to your Management Information Systems (MIS) department. To restrict the data, you will create selection criteria, or a WHERE clause, for the object.

Note: For this example, use a Reporting Object that accesses the Employee data source.

1. Expand the Reporting Object to which you want to add the selection criteria.
2. Select the Where folder and click *New* in the Reporting Object window.

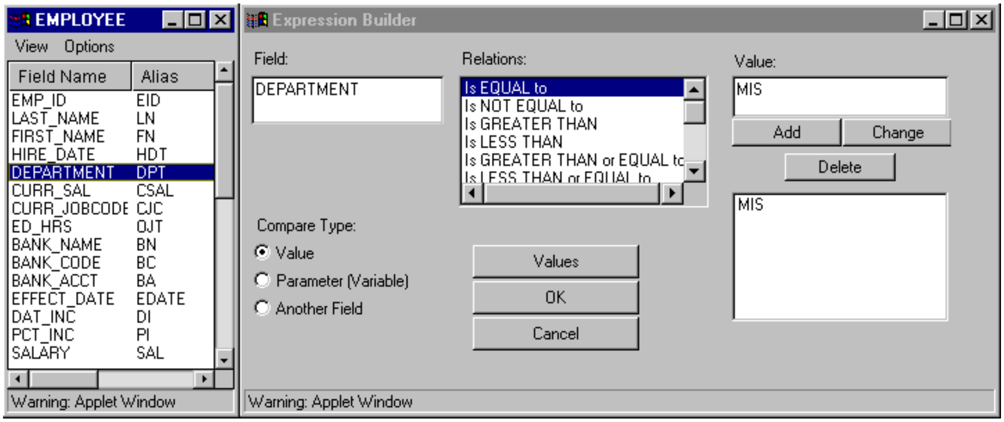
The Expression Builder dialog box opens.

a. Select *DEPARTMENT* in the Fields list.

b. Select *Is EQUAL to* in the Relations list box.

c. Enter *MIS* in the Value input box.

The Expression Builder should resemble the following:



3. Click *OK* to save the selection criteria and return to the Reporting Object window.

Report Component

The Report Component lets you create a report template for your users. You use Report Assistant to create the report and save it as a Reporting Object. When a user selects the Reporting Object in the Domains reporting environment, Report Assistant opens and displays the report template you created. Users can modify the template to create a report that suits their needs and then save the new report.

If you have finished working with the components of the Reporting Object, remember to click *Done* in the Reporting Object window to save the changes.

Note: Syntax and error checking are not performed on the commands you enter until the Reporting Object is executed.

Graph Component

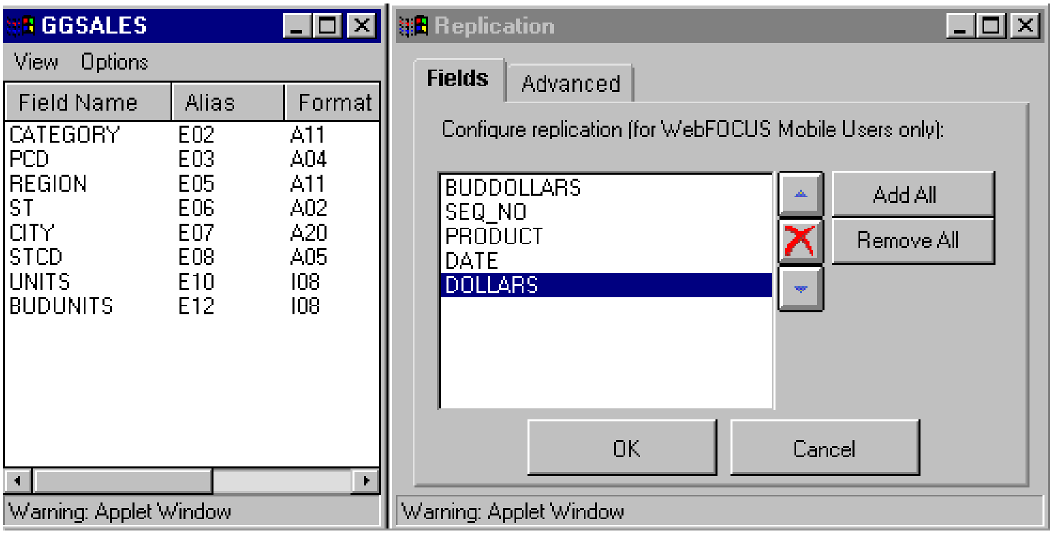
The Graph component works in the same way as the Report component, except that you create a graph template with Graph Assistant. See the *WebFOCUS Managed Reporting End User's Manual* for more information about Graph Assistant.

If you have finished working with the components of the Reporting Object, remember to click *Done* in the Reporting Object window to save the changes.

Note: Syntax and error checking are not performed on the commands you enter until the Reporting Object is executed.

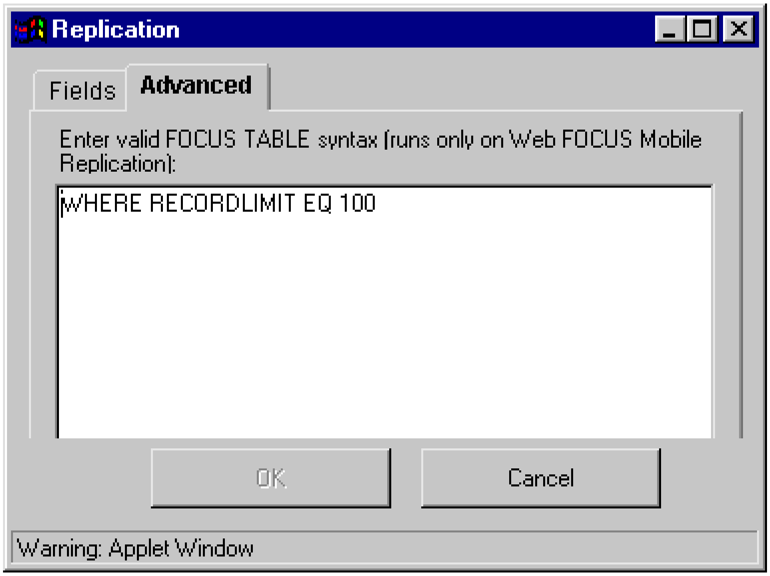
Using the Replication Tool

The Replication tool consists of the Fields List window and the Replication dialog box. The Fields List window lists the field names associated with a Reporting Object's data description. Use the Fields List window to select the individual field names that a WebFOCUS (Windows version) user can replicate to the local environment.



The Replication dialog box consists of two tabs: Fields and Advanced. The Fields tab contains the Replication List that displays field names that you have added from the Fields List window. The Advanced tab allows you to define additional FOCUS commands that limit the data values that WebFOCUS replicates.

For example, you can define a WHERE statement that limits the data values for a specific field.



When the specified parameters have been selected for a Reporting Object, WebFOCUS allows a WebFOCUS (Windows version) user to replicate:

- Field names that have been added to the Replication list.
- Data values that meet any limiting criteria specified in the Advanced tab.

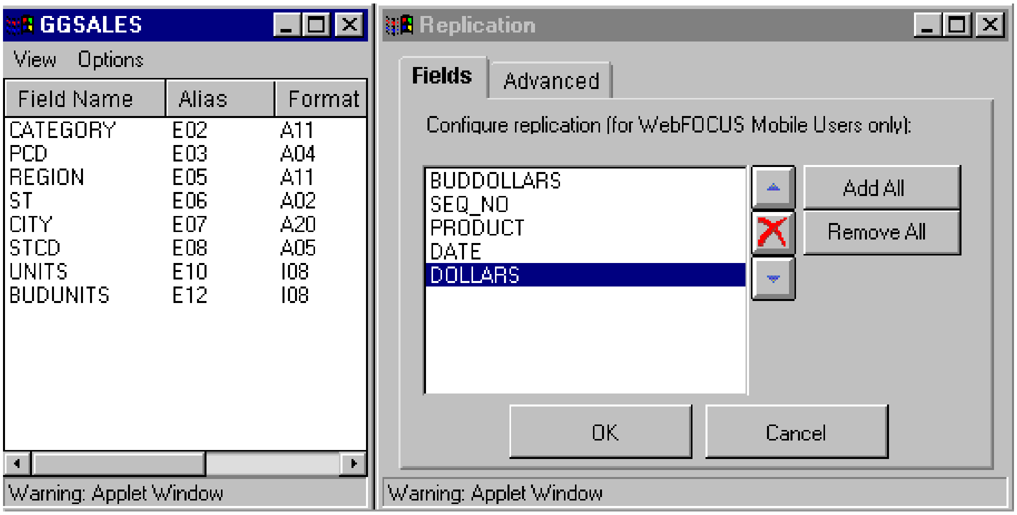
Procedure How to Use the Replication Tool

1. Expand the Reporting Object for which you want to control the replication process.

   WebFOCUS opens the Reporting Object window.

2. Select the Replication component and click *Open*.

WebFOCUS opens the Fields List window and the Replication dialog box:



3. To limit WebFOCUS Developer Studio users' access to field names, you can:
   - Double-click an individual field name in the Fields List window.
   - Click *Add All* in the Replication Fields tab to add every field name in the Fields List window to the Replication Fields tab.

   WebFOCUS adds the field names to the Replication List.
4. To modify the field name list in the Replication Fields tab, you can:
   - Remove individual fields by selecting the field name and clicking *Delete*.
   - Remove all field names by clicking *Remove All*.
   - Change the position of a field name by selecting a field name and clicking the Up or Down arrow buttons.
5. To add FOCUS commands to limit the replication of data values:

   a. Click the Advanced tab in the Replication dialog box.

   b. Enter a valid FOCUS command in the input box.
6. Once you made your selections, click *OK* in either tab to save the replication parameters.

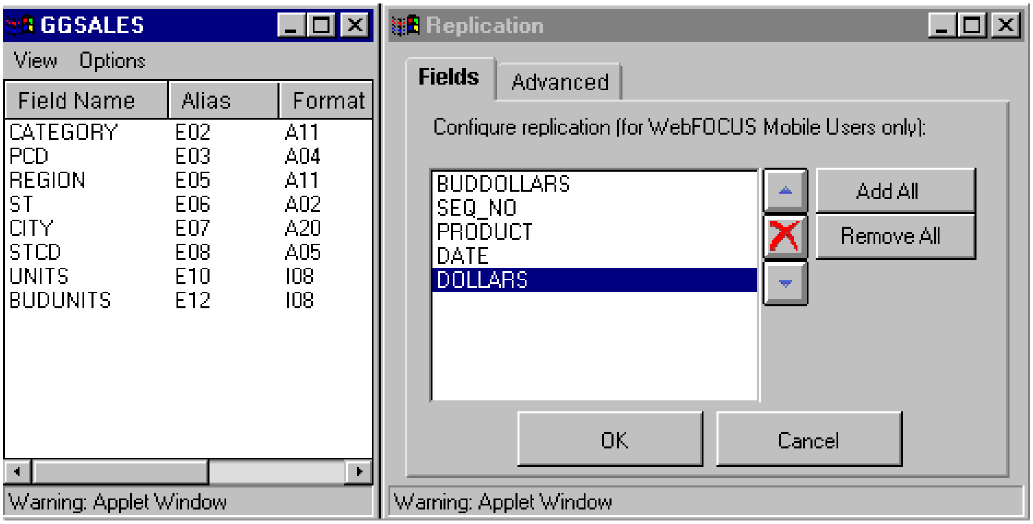
   You return to the Reporting Object window.

   Note: If you have finished working with the components for the Reporting Object, remember to click *Done* in the Reporting Object window to save the changes.

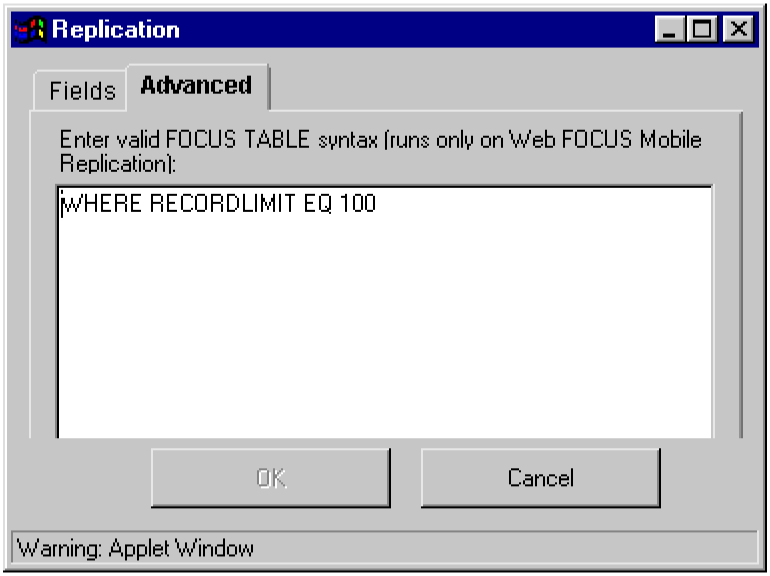
Example Working With the Replication Tool

As an Administrator, you created the Product Sales Reporting Object and want to allow WebFOCUS Developer Studio users to replicate some of the Reporting Object to their local environment. Since the Reporting Object contains a large number of fields and associated data, you want to place limits on the replication process by limiting the number of records returned and by preselecting the fields that can be replicated. You begin by opening the Product Sales Reporting Object and selecting the Replication component.

You select five fields to include in the replication process: BUDDOLLARS, SEQ_NO, PRODUCT, DATE, and DOLLARS.



You then select the Advanced tab and write a short FOCUS command, WHERE RECORDLIMIT EQ 100, to limit the number of records returned by WebFOCUS in the (Windows version) environment.



Remember that you must click *OK* in the Replication tool and then *Done* in the Reporting Object window to save your changes.

When a WebFOCUS Developer Studio user replicates the Product Sales Reporting Object, the replication process will include only the five fields that you have listed under the Fields tab and will create a condition that defines a record limit of 100.

CHAPTER 4

Publishing Reports

Topics:

- Publish Utility
- Coding a Launch Page
- Dynamic Parameter Prompting Considerations

After you have created and tested a report, you can create an HTML launch page for a report listed in the Standard Reports folder.

Publish Utility

When you publish a report, you create a *launch page*, a complete HTML file that calls the Standard Report procedure. The launch page can be a simple form containing Submit, Defer, and Reset buttons that allow users to submit the Standard Report. A more robust launch page will contain data entry fields or drop-down list boxes to supply parameter values if amper variables exist within the Standard Report. We recommend unchecking the Standard Report *Show on User's List* property so that the launch page displays to users while the report remains hidden.

Note: For more information about limitations that apply to amper variables and the Publish utility, see *Dynamic Parameter Prompting Considerations* on page 4-9.

When you create a launch page for your Standard Report, you can:

- Save the launch page in the Standard Reports folder. This enables you to continue developing and refining the launch page before making it available to users. It also enables Managed Reporting users to access the launch page from the Standard Reports tab in Managed Reporting.
- Make the launch page available via the Web. If you save the launch page as a Web page, the page is saved to the *ibi_html/publish* directory on the Web server. You can keep the page in this location or move the file to another location on the Web server. The page can be accessed by entering the URL for the page in a Web browser.

The published page that WebFOCUS creates is a template that you can further customize by manually adding any supported HTML tags and syntax. For example, the HTML launch page can include image files (.gif or .jpg files), tables, frames, JavaScript functions, and hypertext links to other Web pages. In addition, the launch pages that you create and make available via the Web can be accessed using HTML hyperlinks from other Web pages.

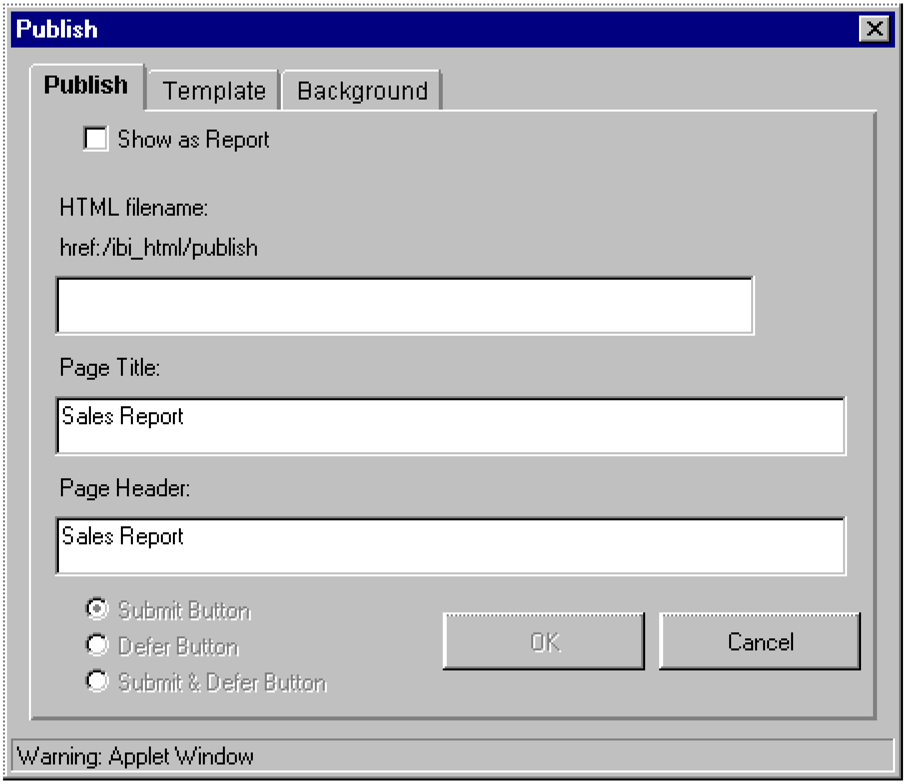
To create the launch page, use the Publish utility. The Publish utility contains the following tabs:

- Publish
- Template
- Background

Using the Publish Tab

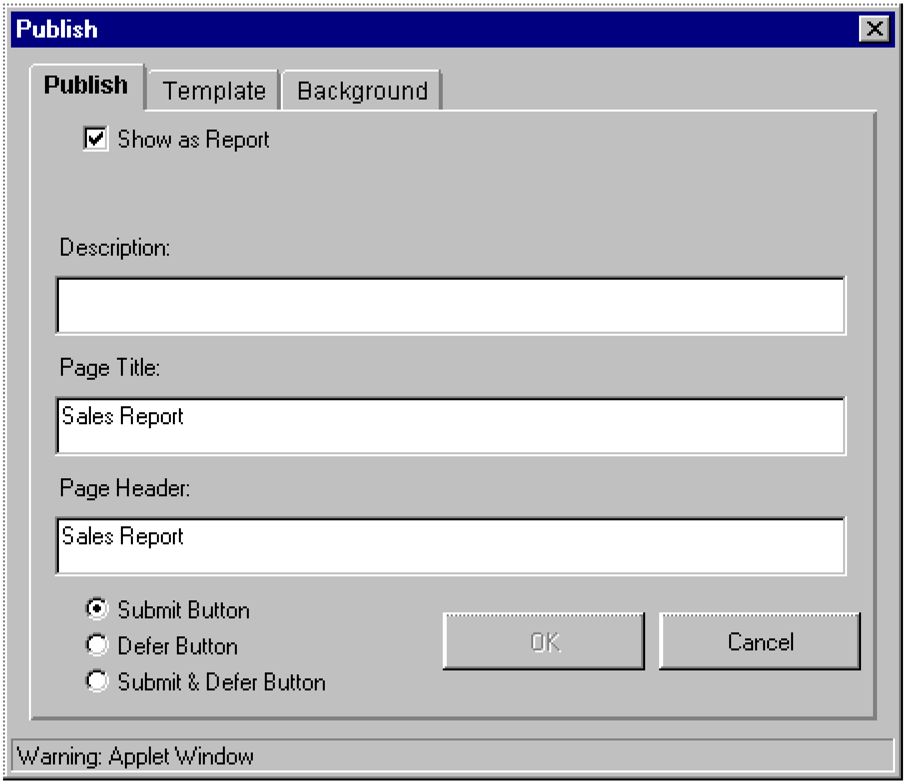
You can use the Publish tab to create a basic HTML launch page for your Standard Report. The Publish tab prompts you for the title and the header of the launch page.

To make the launch page available via the Web, leave the Show as Report check box unchecked.



Note: The Submit Button is selected by default. The Defer Button and the Submit & Defer Button are only available when you publish a launch page as a Standard Report.

You can save the launch page as a Standard Report so that users can access the page from within the Domains reporting environment. Use the Publish tab to specify whether you want to publish a Submit button, a Defer button (for deferred reports), or a Submit and a Defer button. WebFOCUS uses the Standard Report's name as the default entries in the Page Title and Page Header fields. However, you must supply the Description that displays as the Standard Report.

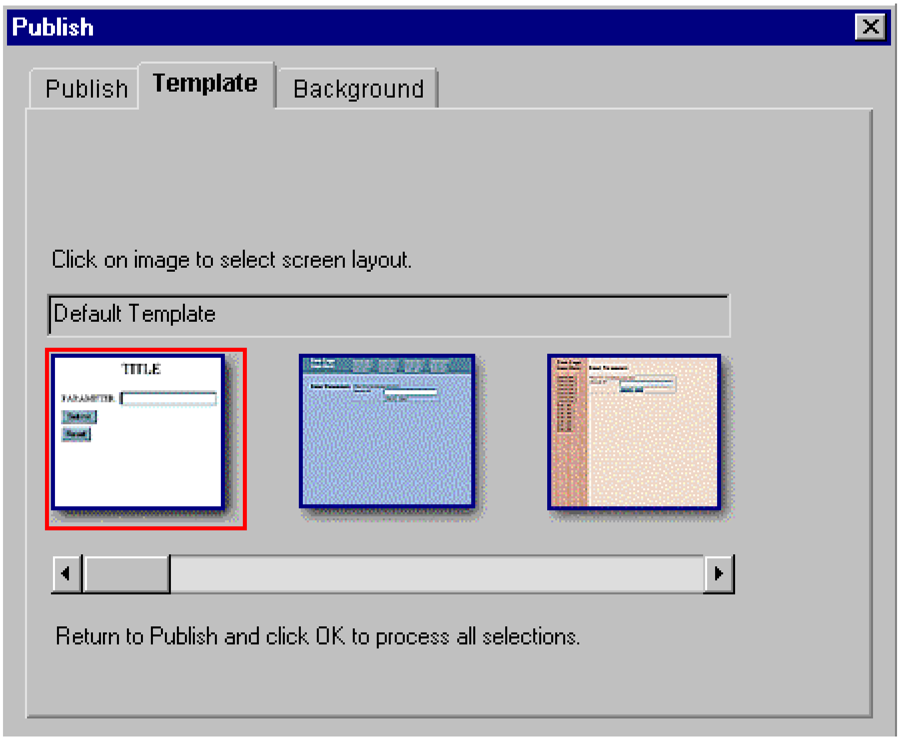


If a Standard Report has the *Only run as a Deferred Report* property selected, the report cannot be published outside Managed Reporting, and the Defer Button is selected by default.

Note: For more information about Standard Report properties, seeChapter 2, *Creating Domains and Standard Reports*.

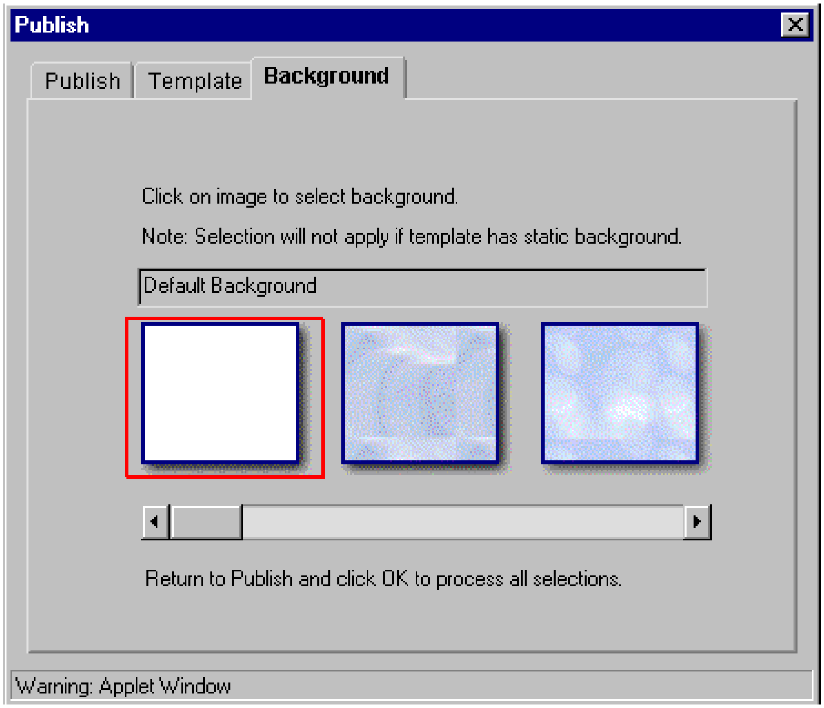
Using the Template Tab

The Template tab contains predefined HTML screen layouts. You use the horizontal scroll bar to view a thumbnail image of each template. When you decide on a template, simply click its image.



Using the Background Tab

The Background tab contains predefined images that appear in the background of the launch page. You use the horizontal scroll bar to view a thumbnail image of each background. When you decide on a background, simply click its image.



Note: WebFOCUS will not apply a background to a template that includes a static background. (There are several types of static backgrounds from which you can choose in the Template tab.) When a template with a static background is selected, the Background tab is disabled.

Procedure How to Publish a Standard Report

1. Expand the Standard Reports group folder that contains the report you want to publish.
2. Select the Standard Report.
3. Click the *Publish* button on the Toolbar, or right-click the report and select *Publish* from the shortcut menu. The Publish dialog box opens.

   Note: The Show as Report check box is not selected by default.

4. To save the launch page to the /ibi_html/publish directory:

   a. Enter a file name for the page. WebFOCUS adds the .htm extension to the file name.

   b. Enter a title for the page in the Page Title input box. If you do not specify a title, WebFOCUS uses the original report's name as the title.

   c. Enter a header for the page in the Page Header input box. If you do not specify a header, WebFOCUS uses the original Standard Report's name as the header.

   Caution: Make sure you supply a unique name for the published report. If your report has the same name as an existing published report, WebFOCUS overwrites the existing published report.

5. To save the launch page as a Standard Report and allow users to access the page from within the Domains reporting environment:

   a. Click the *Show as Report* check box. This enables the launch page options that display in the lower left hand corner. The Submit button is enabled by default.

      To create a Defer button on your launch page, click *Defer Button*.

      To create a Submit button and a Defer button on your launch page, click *Submit & Defer Button*.

      Note: If you select Defer Button or Submit & Defer Button and uncheck Show as Report, the radio buttons will be reset to their default setting (Submit button).

   b. Enter a description for the page. WebFOCUS uses the first eight characters of the description and adds the .htm extension for the page's file name.

   c. Enter a title for the page in the Page Title input box. If you do not specify a title, WebFOCUS uses the original Standard Report's name as the title.

   d. Enter a header for the page in the Page Header input box. If you do not specify a header, WebFOCUS uses the original Standard Report's name as the header.

6. Click the Template tab and select a template. (This step is optional.)

   To select a template, position the red selection box around the template image by clicking the image.

7. Click the *Background* tab and select a background. (This step is optional.)

   To select a background, position the red selection box around the background image by clicking the image.

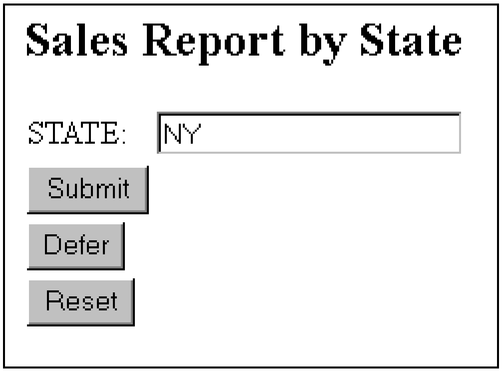
8. Click the *Publish* tab and click *OK*.

If you did not check the *Show as Report* box, WebFOCUS saves the page to the /ibi_html/publish directory. Users can run this report by entering the URL for the page in a browser.

If you did check the *Show as Report* box, WebFOCUS saves the page to the Domain's app directory. Users can run this report from the Standard Reports tab in the Domains View.

Example Running a Published Standard Report

The following displays a published launch page of a Standard Report called Sales Report by State. You are prompted to enter a value for the state field (for example, NY). Since the Show as Report check box and the Submit & Defer Button were selected, you can submit the report to run immediately or as a deferred report.



Coding a Launch Page

When the Publish feature is used to create HTML Launch pages, special HTML and Javascript code is put onto the page. This code controls the behavior of the page's Submit and Defer buttons, which may appear either alone or together on the page depending on how it was created. If you plan to modify the pages created by the Publish utility or plan to create your own, take some time to study the code on these pages. Publish a page with the "Show as Report" option checked for each of the following cases: Submit button only, Defer button only, Submit and Defer buttons. By reviewing the code on these three pages you will be able to understand how to make pages that are intuitive to your users.

Dynamic Parameter Prompting Considerations

Dynamic parameter prompting does not support the following:

- Parameters in an INCLUDE file when the INCLUDE is coded as -INCLUDE &FILENAME.
- INCLUDE files that reside on the WebFOCUS Reporting Server. The INCLUDE files must reside in the Managed Reporting Repository on the Web server to be resolved by the WebFOCUS Client.
- Remote requests. If the procedure on the WebFOCUS Reporting Server contains parameters, the WebFOCUS Client will not be able to resolve them. For example,

```
-REMOTE BEGIN
EX FILENAME
-REMOTE END
```

Dynamic parameter prompting ignores:

- Amper variables created with the -SET command. A value has been explicitly specified.
- Global amper variables (&&NAME).

CHAPTER 5

Data Servers Feature

Topics:

- Working with Data Servers
- Working With Server Applications
- Working With Application Files
- Cataloged Path
- Create Synonym Behavior

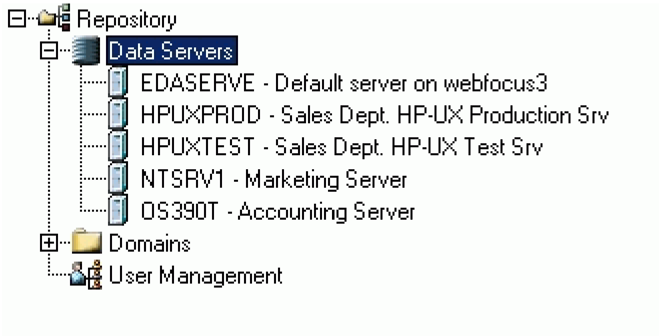
The Data Servers feature gives you access to file resources on all WebFOCUS Servers in your environment. Using Data Servers, you can create and manage metadata, stored procedures, HTML Form files, and WebFOCUS Stylesheets. You can also perform operations on GIF images and other files such as FOCUS data sources. Data Servers has access to all the applications on your servers and gives you the ability to create and delete applications.

You can copy and paste files between applications on one server or between servers. Data Servers allows you to move files between servers on different operating systems, which can be useful, for example, when upsizing an application from Windows NT to OS/390. You can also use Data Servers to access certain files that you wish to copy to a Managed Reporting Domain, such as a procedure.

Data Servers is accessible from the Domain Builder Java applet (in your Web browser) and in Developer Studio. The Data Servers feature is available to Administrators and to Domain Admins that have been granted the privilege.

Working with Data Servers

Data Servers opens to reveal the list of WebFOCUS Servers that are a part of your environment. The server's Node name is shown first followed by its description (if any). WebFOCUS Server descriptions are a new feature for Version 5 Release 2. Contact your WebFOCUS Administrator if you do not see descriptions under Data Servers and would find them useful.



No connections are made to these servers until you open them and there is no information about these servers stored in the Managed Reporting Repository. At any time, you can refresh the list of servers by selecting the Refresh option from the right-click context menu or from the toolbar. A query is made at that time to the WebFOCUS communications configuration file on the Web server to retrieve the list of servers. This list is shared by Data Servers and by the domain properties Server drop-down list.

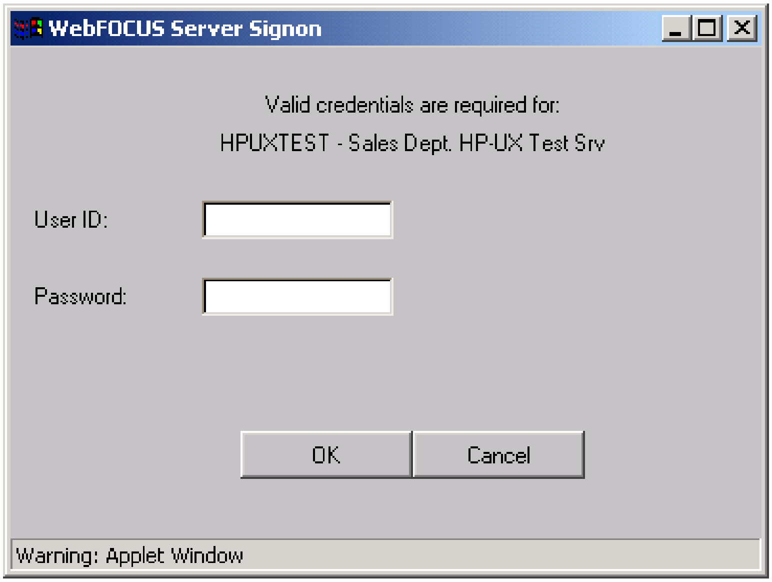
Note: Cluster Nodes (licensed under the WebFOCUS Distribution Facility feature) are not displayed under Data Servers. Currently, if you wish to update server resources in a cluster you need to be sure to update each of the cluster servers separately in Data Servers.

When you open a server node under Data Servers, a check is made to determine the following:

- If the server can be reached. If the server is not running or there is some other error connecting to it, an HTML window appears with a message.
- If the server is Release 5.1.x or later. If the server is older than this, a message is displayed and the node is disabled in Data Servers. You select and use this server in your Domain properties but you cannot manage resources on it from Data Servers.
- If the server is OS/390-based (MVS) or not. Files and application names are limited to 8 characters on OS/390 MVS servers. Longer names are allowed on other server platforms including OS/390 UNIX System Services servers.

- If the server is Application Enabled (APP PATH) or is configured with the traditional Cataloged Path (EDAPATH) settings. This determines which nodes appear under the server.
- If additional authentication is required.

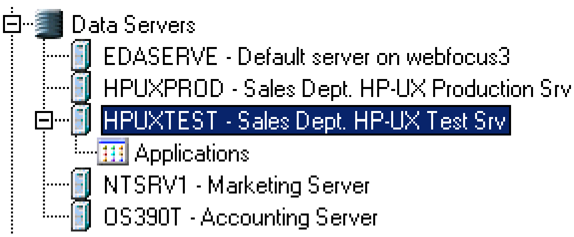
If the server is running with security on and valid default credentials were not found in the WebFOCUS configuration files or in your WebFOCUS Cookie, you will be prompted to sign on:



Whether or not you are prompted for credentials is dependent on how your WebFOCUS Administrator configured the environment.

Note: For additional information about security, see the *WebFOCUS Security and Administration* manual and Best Practices: Enterprise Implementation Considerations at http://techsupport.ibi.com/bestpractices.

After your credentials are validated, the server node opens to reveal a node called Applications. In some cases, another node called Cataloged Path may also appear. For more information about Cataloged Path, see *Cataloged Path* on page 5-7.



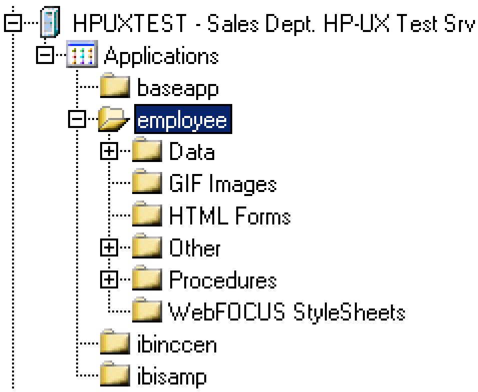
Working With Server Applications

When you open Applications, a query is made to the server to retrieve a list of Applications found under its Application Root (APPROOT) directory. These are not the applications seen by the server when a request is processed, but instead the list of available applications that the server can find if asked to do so.

The command issued by Data Servers to retrieve the list is a FOCUS command called APP LIST. This command is prefaced by another command called APP ENABLE in order to retrieve the list of applications from servers that may be configured in Cataloged Path mode. Because these are FOCUS commands, you can also issue them from within your report requests. For more information about APP commands, see your iWay Server documentation.

Options available on the Applications node include: New Application, Open/Close, and Refresh.

When you open an application, a request is issued to the server to get the list of files in the application. All of the file names are retrieved at once and are sorted into categories. A + sign indicates that there were files of that category found.

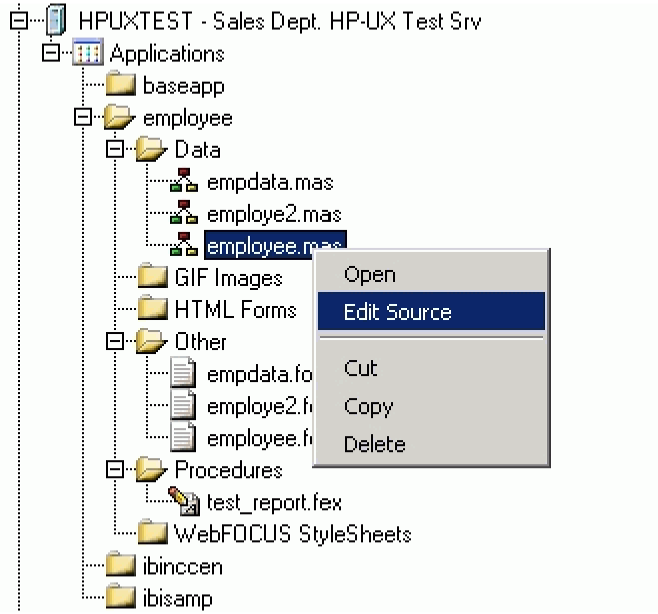


Note: In Developer Studio, there are no category folders shown. Each file's type is displayed in the Explorer table instead.

Options available on an Application node include: Open/Close, Refresh, and Delete.

Working With Application Files

The options available for a file depend on what type it is and on what kind of operation is being performed. Files of like type can be copied and pasted between applications on the same server or on different servers. They can also be copied between Applications and Cataloged Path (if available). If a file with a long name is being copied to OS/390 (MVS) a message is displayed and the operation is cancelled. FOCUS data files can only be copied between locations on the same server. You can also copy certain files from Data Servers to the Domain Builder environment, such as procedure files.



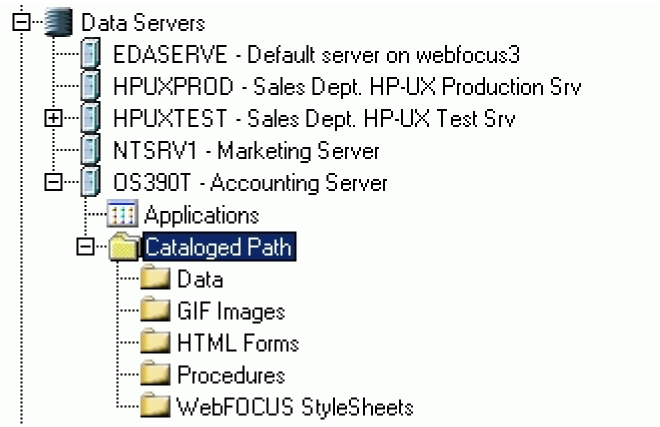
Folder/Item	**Operations**
Data Folder	Create Synonym, Open/Close, Paste. Create Synonym launches an HTML window with the Server's Metadata Management page in it, except for OS/390 MVS servers which launches the traditional Java Synonym Wizard instead.
Data Item	Open, Edit Source, Cut, Copy, Delete
GIF Folder	Open/Close, Paste
GIF Item	Cut, Copy, Delete
HTML Forms Folder	New HTML Form, Open/Close

Folder/Item	Operations
HTML Forms Item	Open, Edit Source, Cut, Copy, Delete
Other Folder	Open/Close, Paste
Other Item	Cut, Copy, Delete. **Note:** These options display only for file types recognized by the WebFOCUS Server and with the following extensions: BMP, FOC, FTM, PDF, TXT, XML, XLS. Otherwise, the file is displayed with no options. Files of unsupported types can sometimes appear because someone used operating system commands to put the file into the server's Application directory or because the WebFOCUS Server is configured on the same machine as the WebFOCUS Client and the two share the same Application Root (APPROOT) directory.
Procedures Folder	New Procedure, Open/Close, Paste
Procedures Item	Open, Edit Source, Cut, Copy, Delete
WebFOCUS StyleSheets Folder	New WebFOCUS StyleSheet, Open/Close, Paste
WebFOCUS StyleSheets Item	Open, Edit Source, Cut, Copy, Delete

Cataloged Path

The traditional Cataloged Path (EDAPATH) configuration is being replaced by the new Application Path (APP PATH) setting. All WebFOCUS Servers now install with Application Path configured.

In the event that your WebFOCUS Administrator has changed the installed search path setting to Cataloged Path, you will see both nodes under the server.



The options under Cataloged Path are nearly identical to those under an Application, although there are some differences. Cataloged Path is a flat view of a series of concatenated directories. If two files of the same name are found, only the first one can be accessed as it masks the second one. By contrast, all of the files in an Application are in one directory, which therefore cannot have duplicate file names. A separate query is issued to retrieve each type of file from Cataloged Path, whereas all of the files of all types are retrieved in one query in an Application.

Lastly, the Create Synonym option has been removed from the Data folder of Cataloged Path. No new metadata can be created via the Managed Reporting graphical tools against a WebFOCUS Server in Cataloged Path mode. You can still access and edit your existing metadata files from Data Server. You can also issue the FOCUS CREATE SYNONYM command manually from within a procedure. For more information about the CREATE SYNONYM command, see your FOCUS Language Reference.

Create Synonym Behavior

Synonyms are now created using the Server Console. The Server Console is accessed in the Data Server component when selecting Create Synonym. This functions for all supported platforms except for O/S 390 (MVS) (which still accesses the Synonym Wizard.) Developers can view existing and new Master and Access Files and delete and refresh synonyms in the Server Console. Developers can also create synonyms for remote Reporting Servers and for relational and multidimensional data sources. For more information, see *Creating Synonyms* in *WebFOCUS Describing Data With Graphical Tools*.

CHAPTER 6

Creating Users and Groups

Topics:

- User Administration Interface
- User Privileges
- Defining Domains
- Defining Groups
- Defining Users

In order to enable a user to access the Standard Reports and Reporting Objects in a Managed Reporting domain, a Managed Reporting Administrator must create a user entry (user ID and password) for the user and specify the domains that the user can access. You specify the domains a user can access by defining groups that associate users and domains. A user listed in a group can access any of the domains listed in the same group.

For example, you create an Accounting group that contains the Payroll and the Company Employee Information domains. You do not want all employees to have access to this confidential information, so you only include members of the Accounting department as users in the Accounting group.

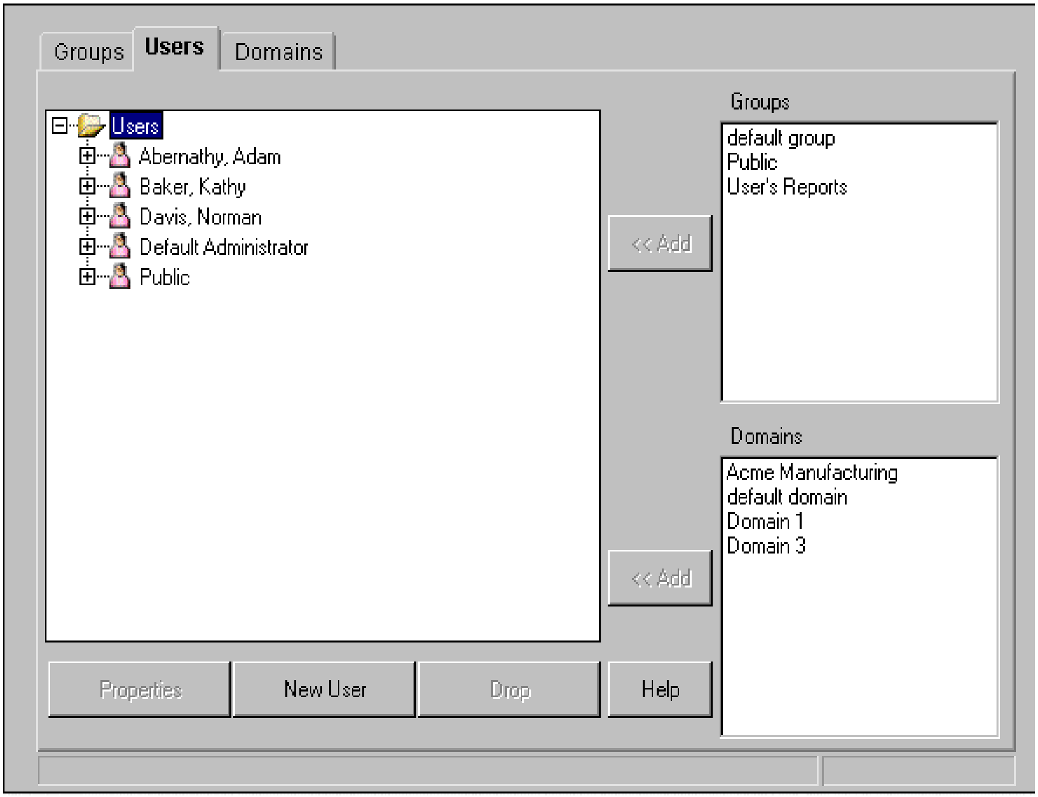
Before you can group users and domains, you must create user profiles, domains, and group folders. You create domains using Domain Builder. For more information on creating domains, see Chapter 2, *Creating Domains and Standard Reports*. You can create user profiles and groups, and associate users with groups and domains with the User Administration interface.

User Administration Interface

The User Administration interface is a three-tabbed dialog that allows you to:

- Create users and groups.
- Assign domains and users to groups.

Within each tab, the User Administration interface is divided into three list boxes. The contents of a particular tab are listed in the largest box, while the contents of the other tabs are listed in the list boxes along the right side of the interface.



You can create a group or user from the Groups tab, the Users tab, or the Domains tab. However, domains can only be created in Domain Builder. Any function available from an active button (Properties, Delete Group, Delete User, New Group, New User, Drop from Group, Drop from User) is also available from a pop-up menu that appears when you right-click a tree item. If you select a user within the Groups or Users tabs, the Properties option allows an Administrator to specify the user's password, privileges, and capabilities.

User Privileges

To enable a user to access the Standard Reports and Reporting Objects in a Managed Reporting domain, you must create a profile (user ID and password) for the user and specify the type of access (privileges) that the user has to Managed Reporting. These privileges will allow access in both the Managed Reporting interface and in Dashboard.

You can assign one of the following types of privileges:

User	Can only run reports. The user cannot invoke Report or Graph Assistant, save from the OLAP slice-n-dice options, or save deferred report output.
Analytical User	Has access to the environment and any domain that you associate with the user in addition to Dashboard. The user can run Standard Reports or saved reports from those domains, as well as create My Reports using the Reporting Objects in those domains. See the *WebFOCUS Managed Reporting End User's Manual* for more information.

Note: Users and Analytical Users can login to Dashboard or the Managed Reporting applet environment.

Domain Admin	Does not have access to the User Administration Tool when using the Domain Builder and cannot create or delete domains. In Domain Builder, the user can see and maintain only the domains that have been assigned by a Managed Reporting Administrator. The domains a Domain Admin administers can be all of the assigned domains or a subset of the assigned domains.
Administrator	Has full access to Managed Reporting and can create and modify domains and change user properties and associations.

Note: Domain Admins and Administrators can login to the Managed Reporting applet environment or Developer Studio.

HTML User	Has access to the HTML version of Managed Reporting. This user can only run Standard Reports. The user cannot save or create My Reports. See the *WebFOCUS Managed Reporting End User's Manual* for more information.

Defining Domains

Before you can group domains and users, you must create domains, user profiles, and group folders. Domains contain the Standard Reports and Reporting Objects that enable users to access the information they need. You create domains using Domain Builder. You associate domains with groups and users with the User Administration tool.

For more information on creating domains, see Chapter 2, *Creating Domains and Standard Reports*.

Note: You cannot alter the entries in the HREF and the Domain input boxes. You can change a domain's name using the Domain Builder.

Procedure How to Review Domain Properties

1. Select the Domains tab in the User Administration interface..
2. Select the domain you want to review and click *Properties*. The Domain Properties dialog box opens.

Procedure How to Add a Group Association to a Domain

To associate one or more groups with a domain:

1. Select the Domains tab in the User Administration interface.
2. Expand the Domains folder. WebFOCUS displays a list of available domains.
3. Select a domain in the left hand pane of the window.
4. Select the Groups folder under the domain.
5. Select a group or groups in the right hand pane of the window.
6. Click *Add*. WebFOCUS displays the group or groups listed under the domain name.

Procedure How to Delete a Group Association From a Domain

1. Select the Domains tab in the User Administration interface.
2. Expand the Domains folder. WebFOCUS displays a list of available domains.
3. Select a domain in the left hand pane of the window.
4. Select the Groups folder under the domain.
5. Select a group or groups in the right hand pane of the window.
6. Click *Delete Group*. WebFOCUS prompts you to confirm that you want to delete the group association.
7. Click *OK*.

You can also click *Drop from Domain* to save the group but remove it from the domain.

Defining Groups

Before you can group users and domains, you must create user profiles, domains, and group folders. You create group folders with the User Administration interface.

After you create a group folder you can specify which users and domains are associated with the group. Every user listed in a group has access to every domain listed in the same group. By associating users and domains into groups, you ensure that users can access the information they need, while protecting sensitive or confidential data.

Procedure How to Create a New Group Folder

1. Select the Groups tab in the User Administration interface..
2. Select the Groups folder.
3. Click *New Group*. The New Group dialog box opens.
4. Enter the name of the group in the input box and click *OK*. The User Administration interface adds the new group below the Groups folder.

Procedure How to Review Group Properties

1. Select the Groups tab in the User Administration interface.
2. Select the group that you want to review.
3. Click *Properties*. The Group Properties dialog box opens.

Note: You cannot alter the entries in the HREF and the group input boxes.

Procedure How to View Users and Domains in a Group

To view a list of groups, and the domains and users associated with a group:

1. Select the Groups tab in the User Administration interface.
2. Expand a group folder. The Domains and Users folders appear beneath each group name.
3. To see a list of domains associated with the group, expand the Domains folder. A list of domains associated with the group appears.

   To see a list of users associated with the group, expand the Users folder. A list of users associated with the group appears.

Procedure How to Add Domains to a Group Folder

1. Select the Groups tab in the User Administration interface.
2. Click a group name in the left hand pane of the window. WebFOCUS displays the Domains and Users folders beneath the group name.
3. Select the Domains folder.
4. Select a domain from the domains list in the right hand pane of the window and click *Add*. WebFOCUS displays the domain you selected beneath the Groups folder.

Procedure How to Remove a User From a Group Folder

1. Select the Groups tab in the User Administration interface.
2. Select the user you want to delete.
3. Click *Delete User*. WebFOCUS prompts you to confirm that you want to delete the user.
4. Click *OK*.

You can also click *Drop from Domain* to save the user but remove it from the group.

Procedure How to Remove a Domain From a Group Folder

1. Select the Groups tab in the User Administration interface.
2. Select the domain you want to drop.
3. Click *Drop from Group*. The User Administration interface removes the domain from the group folder. You cannot delete the domain with the User Administration tool. You must perform this in Domain Builder.

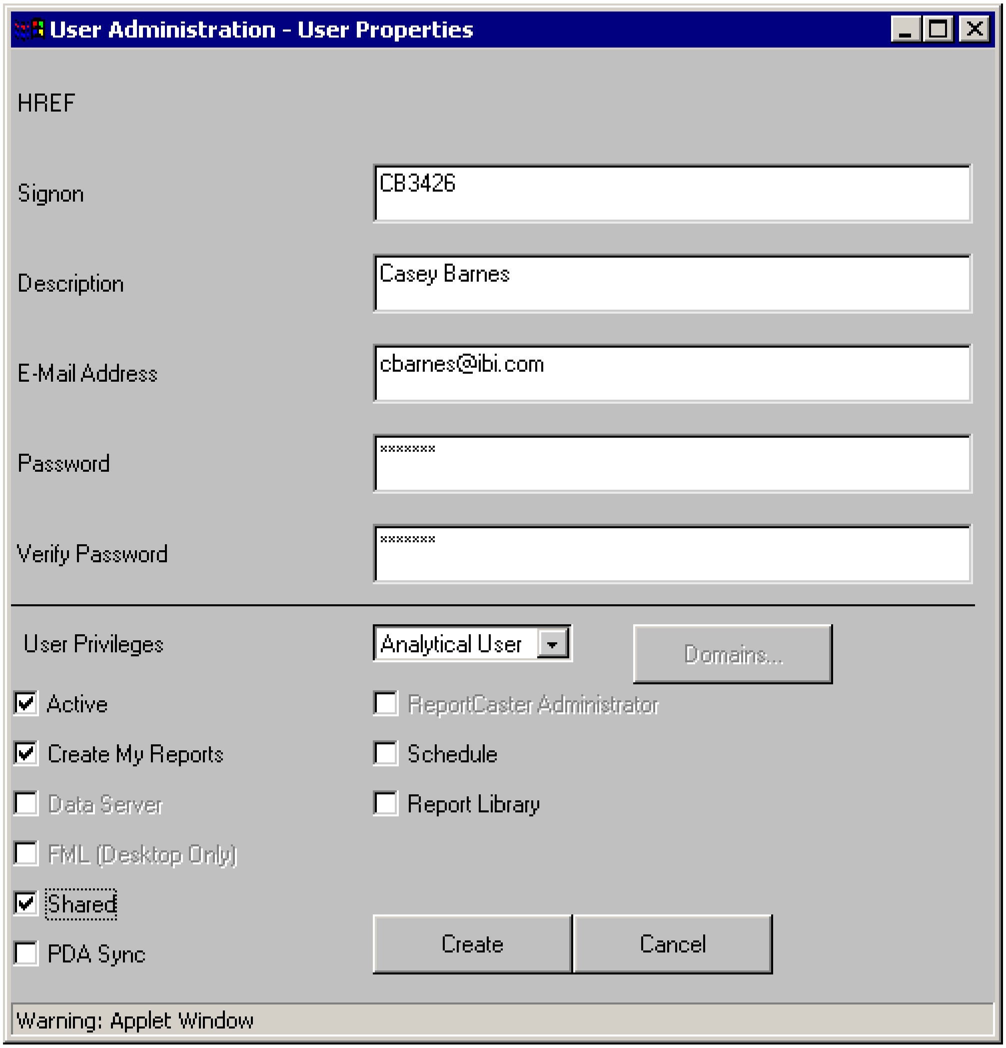
Defining Users

You can create a new user and assign user capabilities and privileges all in one step. Once you have created some domains and associated groups, you can create a new user from the Groups tab which will enable you to automatically assign the user to the intended group.

Alternatively, you can create a user profile from the Users tab and then associate it with a group or a domain. Associating users with domains and groups enables the user to run the reports and access the Reporting Objects stored in the associated domains.

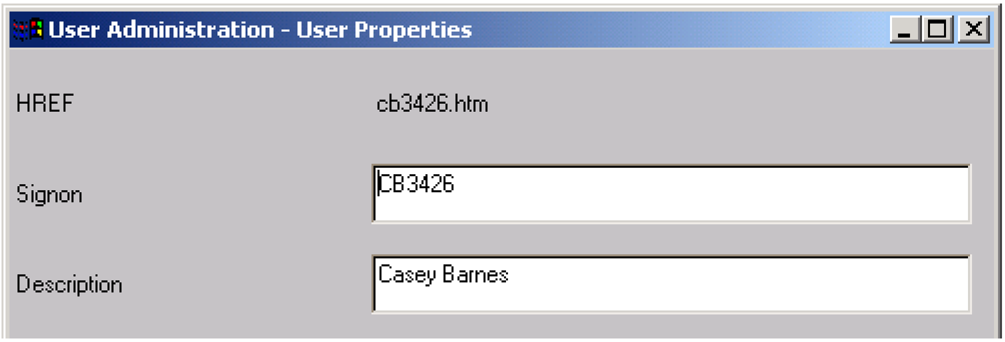
User Administration User Properties Window

The User Administration - User Properties window enables an Administrator to specify the user's password, privileges, and capabilitites:



The User Properties dialog box is divided into two parts. The top part is used to set general properties for the user. The bottom part is used to set user privileges.

Note: Once the user account is created, a unique reference is generated and associated with the user. When editing the properties of an existing user with the User Properties dialog box, this value is displayed next to the HREF label but cannot be changed.



Reference

General User Properties

Except for HREF, the properties shown in the top part of the User Properties dialog box can be changed at any time by the Administrator.

HREF	Internal Managed Reporting reference for this user account.
Signon	Required property. The User ID used to sign on to this user account. This value can be a maximum of 48 characters and cannot include spaces. This value can be changed after the account is created.
Description	Required property. The description displayed for the user account in most places of Managed Reporting and ReportCaster. If you have many users, you may consider a convention such as Lastname, Firstname for values in this field. This will make it easier to locate users in the lists.
E-Mail Address	An e-mail address is required for the optional Report Library product, but you do not need to include it for ReportCaster scheduling without using the library.

Password Fields	Optional property. You can assign a password for the user account or leave it blank. At any time, you can reset the user's password. The user can also reset their password themselves on the logon page. For information about scenarios where a Managed Reporting Administrator will be unable to update a user’s password, see *Password Change Authority* on page 6-13. **Note:** It is also possible to integrate Managed Reporting security with other systems such as Web server or LDAP security. In this case, you may need to leave the password property blank. See the *WebFOCUS Security and Administration* manual for more information about signon integration.

User Capabilities

The User Administration interface allows a Managed Reporting Administrator to assign additional capabilities to a user:

Active	Enables the user to log on to Managed Reporting and Dashboard. If the Active check box is not selected, the user will not be able to logon to Managed Reporting or Dashboard. The Administrator can still assign the user to groups and activate the user ID at a later time.
Create My Reports	Enables the user to create My Reports. When Analytical User is selected, the Create My Reports check box is enabled.
Data Server	Specifies whether a Domain Admin can access the Domain Builder Data Server component. Also controls whether or not the server and application path properites on a domain, report, or Reporting Object can be modified by the Domain Admin user.
Financial Report Painter (Developer Studio)	Allows a Developer Studio user, logged into a WebFOCUS Repository, to access the Financial Report Painter tool. The Financial Report Painter is only available as part of Developer Studio; Managed Reporting (browser version) and Dashboard do not include the FML Painter. You can assign this capability to an Administrator, Domain Admin, or Analytical User who accesses a WebFOCUS Repository from Developer Studio.

Shared	Is required for a user to share a My Report with other users who have access to the same domain. Once a user shares a My Report, other users can run the report and copy the report into their own My Reports tab if they have My Reports capability. The Shared capability does not have to be active for a user to run or copy reports that have been shared by others. You can assign this capability to Administrators, Domain Admins, and Analytical Users. **Note:** HTML users do not have access to Shared Reports.
PDA Sync	Allows Palm Computing and Pocket PC mobile users to select the PDA Sync report property for Standard Reports. These reports are then sent to PDA users authorized for sync access. This capability is only available when PDA Sync is installed.
ReportCaster Administrator	When selected, the Schedule and Report Library options are automatically selected. ReportCaster Administrator only appears when ReportCaster is installed. By default, it is unchecked. It is enabled only when the Administrator User Privilege is selected.
Schedule	Allows a user to schedule procedures. When a Managed Reporting Administrator enables scheduling capability for a user, the user can access ReportCaster from the ReportCaster (clock) option on the gray toolbar. This capability is available only when ReportCaster is installed. By default, the Schedule check box is not selected (unchecked). You can assign this capability to an Administrator, Domain Admin, or Analytical User.

Report Library	The Report Library check box only appears when the Report Library is installed. The Report Library is an optional storage and retrieval facility of ReportCaster that must be stored in an SQL repository. Can contain any information that is distributed by ReportCaster. The Report Library includes secure access to library content, the ability to save multiple versions of the same output, and the ability to set an expiration date or keep a specified number of versions. The Report Library is only available to ReportCaster users who have been granted access to the library.
Domains	This button is only enabled when Domain Admin is selected from the drop-down list. With this feature, the Managed Reporting Administrator can optionally specify a subset of domains the Domain Admin can administer. From Domains on the blue toolbar and from Dashboard, the Domain Admin has access to all domains within the groups that the Managed Reporting Administrator assigns. However, from Domain Builder (on the blue toolbar or in Developer Studio) the Domain Admin can only administer the subset of domains set by the Managed Reporting Administrator. For more information about this feature, see *Restricting the Scope of Domain Admins* on page 6-14.

Procedure How to Create a New User

1. Select the Groups tab in the User Administration interface.
2. Click *New User*. The User Administration - User Properties dialog box opens.
3. Enter the user's signon name, description for the user, e-mail address, and password.

   Note: The user's signon name is the name used at logon. There is a maximum limit of 48 characters for both the user's signon name and password.
4. Enter the password again in the Verify Password input box to ensure that you did not make a mistake in the Password input box.
5. Select one of the following options from the User Privileges drop-down list.
   - User
   - Analytical User
   - Domain Admin

- Administrator
- HTML User

For more information on user privileges, see *Defining Users* on page 6-6.

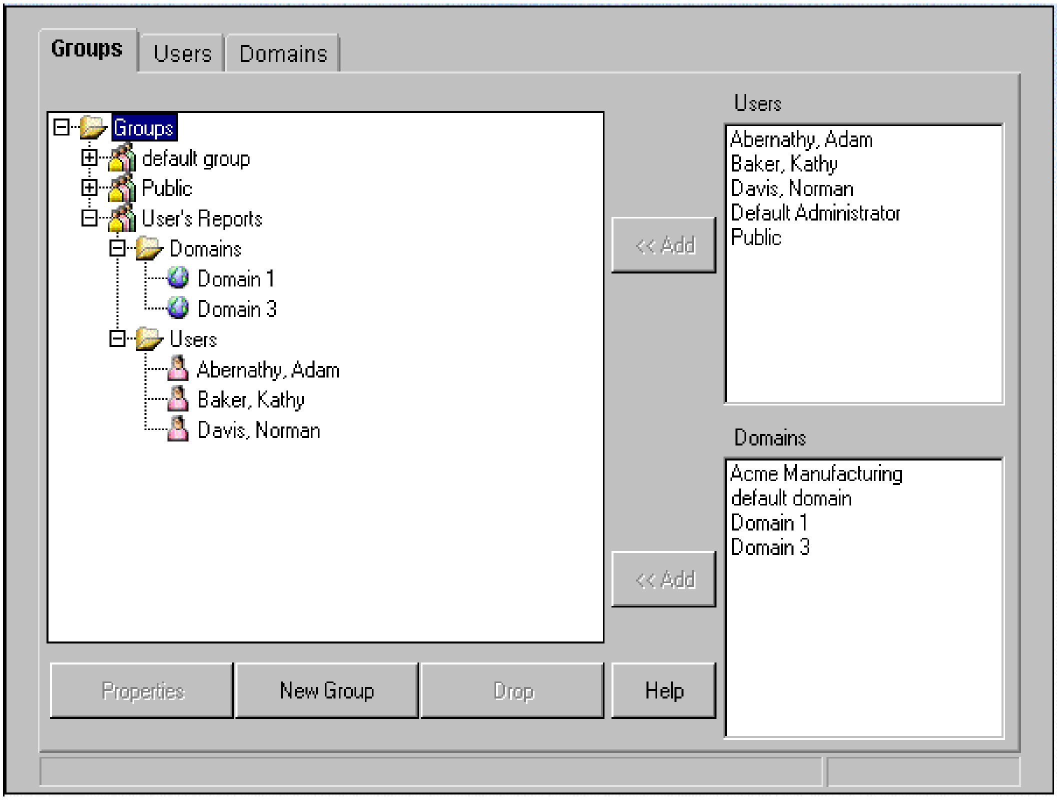
6. Select user capabilities by clicking the appropriate check boxes:
   - Active
   - Create My Reports
   - Data Server
   - FML (Desktop Only) is specific to a user using Developer Studio to connect with the Managed Reporting Repository. FML Painter is not available in Java-based Managed Reporting or in Dashboard.
   - Shared
   - PDA Sync
   - ReportCaster Administrator
   - Schedule
   - Report Library

   The following capabilities are dependent on product options being installed:
   - PDA Sync requires PDA Sync.
   - ReportCaster Administrator and Schedule require ReportCaster.
   - Report Library requires ReportCaster and Report Library.

   Note: For more information on user capabilities, see *User Capabilities* on page 6-9.

7. Click *Create*. The User Administration-User Properties dialog box opens again so that you can create more users. Any privileges or capabilities that you set for the user you just created remain set for the next user. This makes it easier to create multiple users with a given capability, such as Schedule. You do not need to keep checking Schedule every time you create a new user. It remains set until you unset it.

When you have finished creating users, click *Cancel*. The User Administration interface displays the new user name(s) (in this case, Public) below the Users folder.

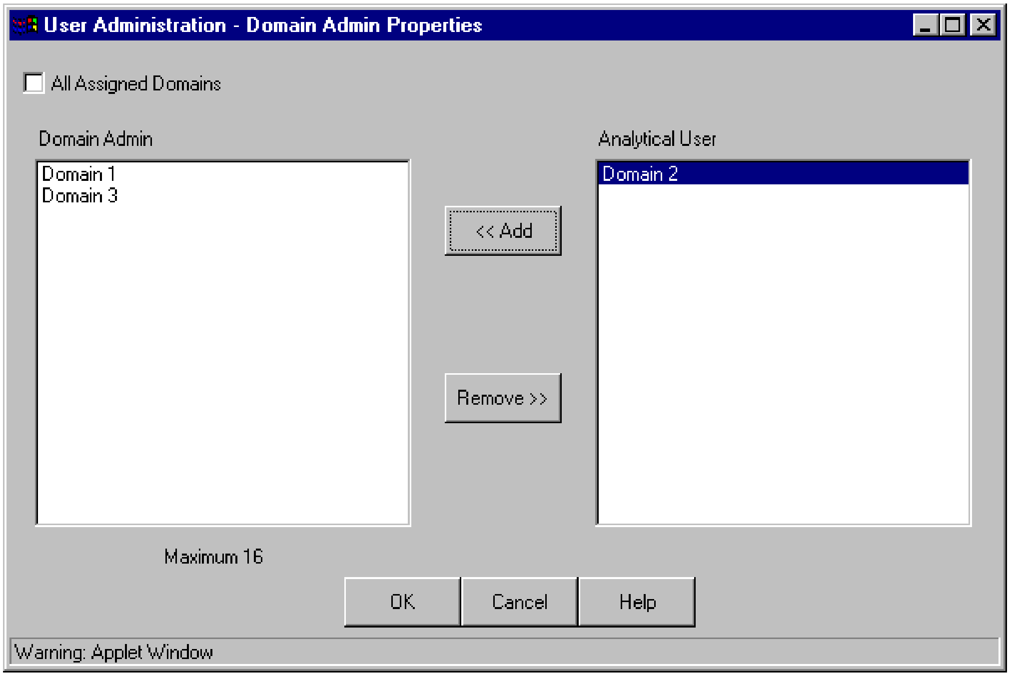


Password Change Authority

In Version 5 Release 2, Managed Reporting and ReportCaster work with the same user information. When installed, ReportCaster keeps track of Managed Reporting users who have been granted Library and/or Schedule capability. A Managed Reporting Administrator cannot update the password of users who have Library and/or Schedule capabilities unless the Administrator has the ReportCaster Administrator capability. The built-in Managed Reporting Administrator account, admin, has ReportCaster Administrator capability and can create additional Administrators with ReportCaster Administrator capability.

Restricting the Scope of Domain Admins

When the Managed Reporting Administrator clicks Domains, the User Administration - Domain Admin Properties window opens:



When you uncheck the All Assigned Domains check box, the Domain Admin and Analytical User frames are enabled. You can then add domains to the Domain Admin frame. When a domain is added to the Domain Admin frame it will no longer list in the Analytical User frame. When a domain lists in the Domain Admin frame, the Domain Admin can access the domain from Domain Builder (on the blue toolbar or in Developer Studio), the Domains environments, and from Dashboard. When a domain lists in the Analytical User frame, the Domain Admin can only access the domain from the Domains environment and Dashboard.

The User Administration - Domain Admin Properties window includes the following defaults:

- All Assigned Domains check box is selected.
- Left frame, Domain Admin, is empty. This frame is also disabled.
- Right frame, Analytical User, lists all domains in the groups assigned to the Domain Admin. This frame is also disabled.
- Add and Remove buttons are disabled.
- There are no domains listed unless the user is in a group already.

Reference Domain Admin Properties

The following table describes each feature in the User Administration - Domain Admin Properties window:

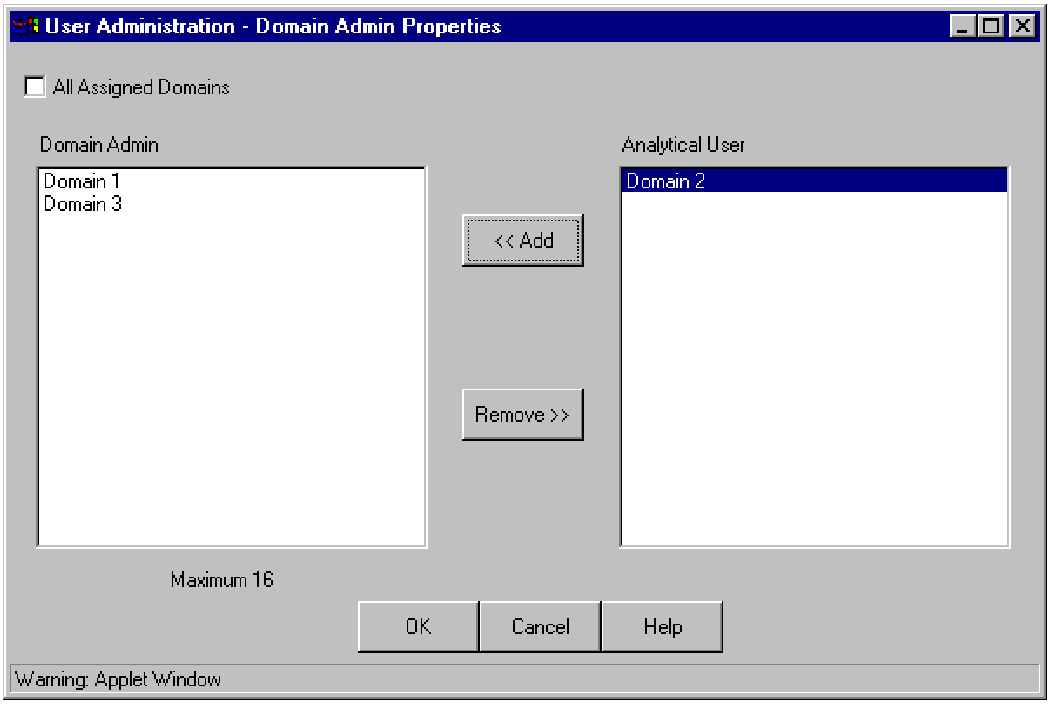
Features	Descriptions
All Assigned Domains check box	Allows the Managed Reporting Administrator to specify whether the Domain Admin can administer all the domains in the assigned groups or a subset of these domains. This feature is selected by default. If selected, the Domain Admin can administer all domains in the groups to which they are assigned. If not selected, the Domain Admin is restricted to administer only the assigned domains.
Domain Admin frame	Lists the domains the user can access from Domain Builder (on the blue toolbar or in Developer Studio), the Domains environments, and from Dashboard. The Domain Admin can administer a maximum of 16 domains when a subset is specified. There is no limit when a subset is not specified. Multi-select is implemented. When a domain lists in the Domain Admin frame, the Domain Admin can access the domain from Domain Builder d.
Analytical User frame	Lists the domains the user can access only from the Domains environment or Dashboard. Multi-select is implemented.
Add	Moves selected domains from the Analytical User frame to the Domain Admin frame. This is disabled when there are 16 domains listed. When using multi-select and more than 16 domains are selected, the following message appears: The maximum number of domains that can be assigned is 16.
Remove	Moves selected domains from the Domain Admin frame to the Analytical User frame.
OK	Saves selections and closes the dialog box.
Cancel	Discards changes and closes the dialog box.
Help	Invokes online help.

Example

Assigning Domains

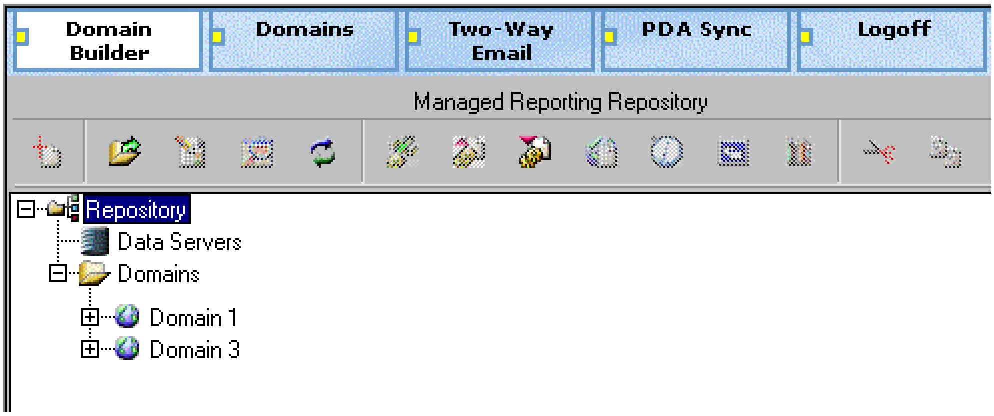
In the following example, the Managed Reporting Administrator assigns Domain 1 and Domain 3 to the Domain Admin frame. The Managed Reporting Administrator also assigns Domain 2 to the Analytical User frame.

As a result, the Domain Admin is able to access Domain 1 and Domain 3 from Domain Builder. Domain 1, Domain 2, and Domain 3 are accessible to the user from the Domains environment and Dashboard where they have the capabilities of a Managed Reporting Analytical User.



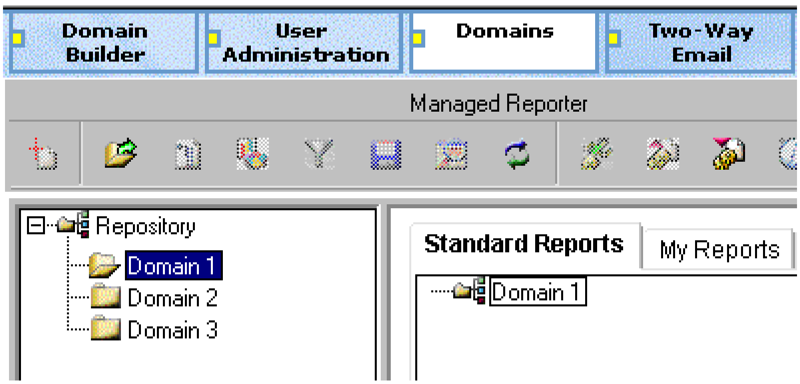
Environments

The domains the Domain Admin can administer are listed in a tree hierarchy, which displays as follows in the Domain Builder environment:

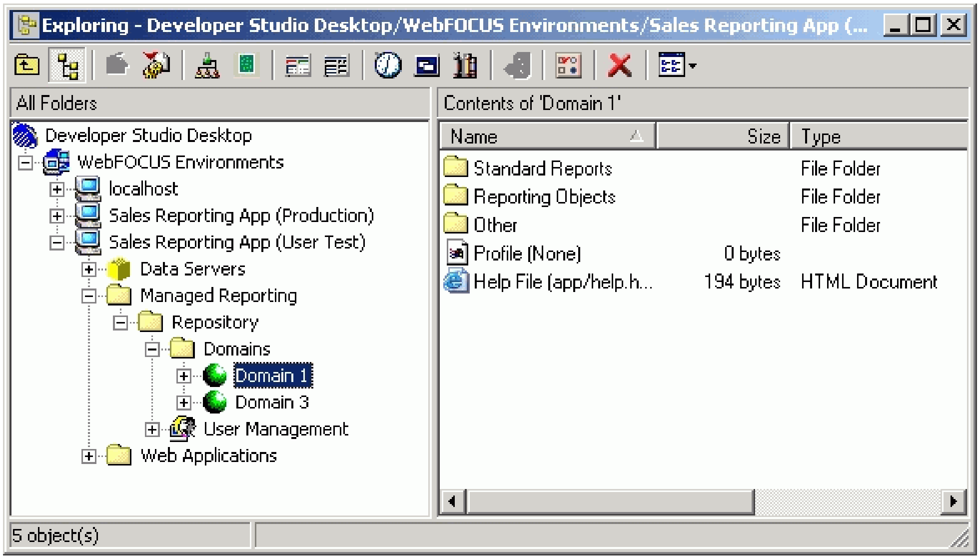


If the Managed Reporting Administrator changes the set of domains the Domain Admin is allowed to access while the Domain Admin is logged into Managed Reporting, the changes will not impact Domain Admin access until the next time the Domain Admin logs into Managed Reporting.

The domains assigned to the Domain Admin as an Analytical User display as follows:



The domain restriction is also applied to Domain Admins using Developer Studio.



The Dashboard environment view is determined by the administrator.

CHAPTER 7

User Management

Topics:

- User Management Tree Object in Domain Builder
- Managing a User's Reports

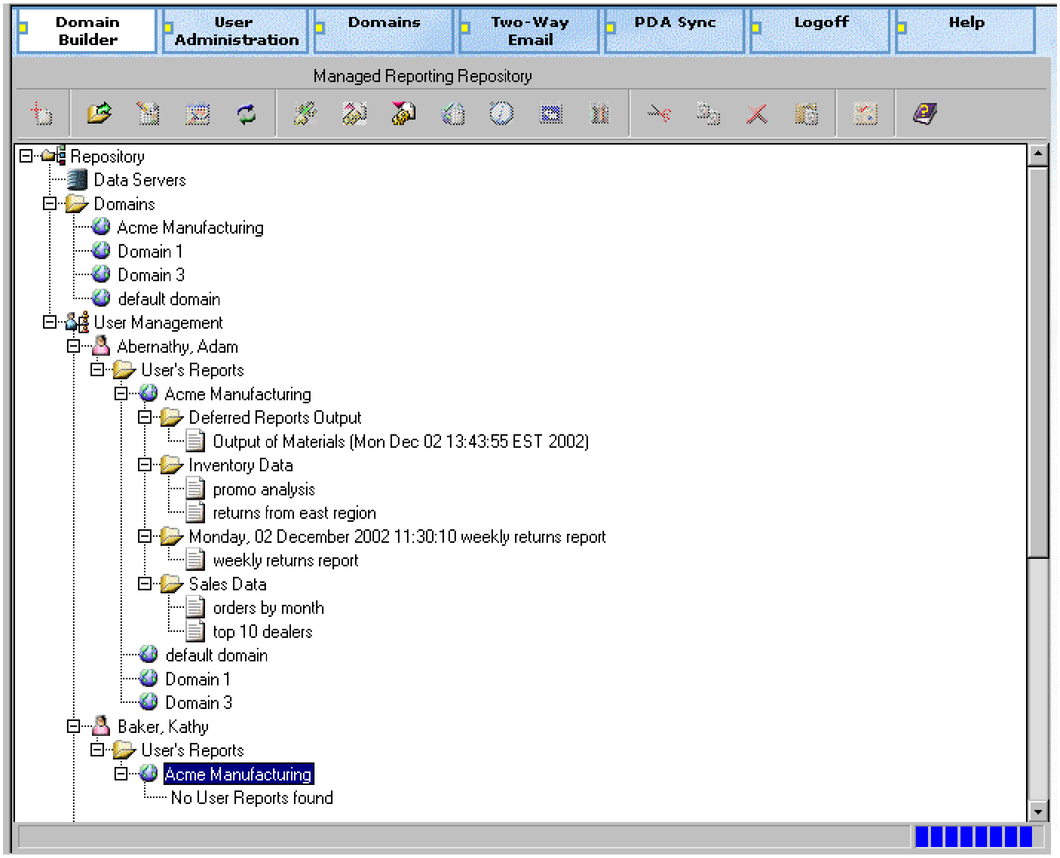
The User Management tree object in Domain Builder enables Managed Reporting Administrators to view user's reports. All types of reports are displayed, including My Reports, saved deferred output, and distributed ReportCaster output. Managed Reporting Administrators can open, edit, run, save, and delete Managed Reporting user's reports. Saved and distributed output can be deleted or have its properties changed. Both active and inactive users are displayed and each user displays regardless of whether they have created any reports.

User Management Tree Object in Domain Builder

Whenever a Managed Reporting Administrator logs into Managed Reporting, the Domain Builder interface includes a User Management tree object. The User Management feature enables the Managed Reporting Administrator to access each user's reports. Each user displays regardless of whether they have created any reports. A folder is listed under each user, and contains the domains to which the user has access.

The User Management feature displays only for Managed Reporting Administrators. It does not display for Managed Reporting Domain Admins.

When you open a folder, all types of user reports display, including My Reports, saved deferred output, and distributed ReportCaster output. Opening a user's domain shows either their report folders, which can be opened or a message that no user reports were found.

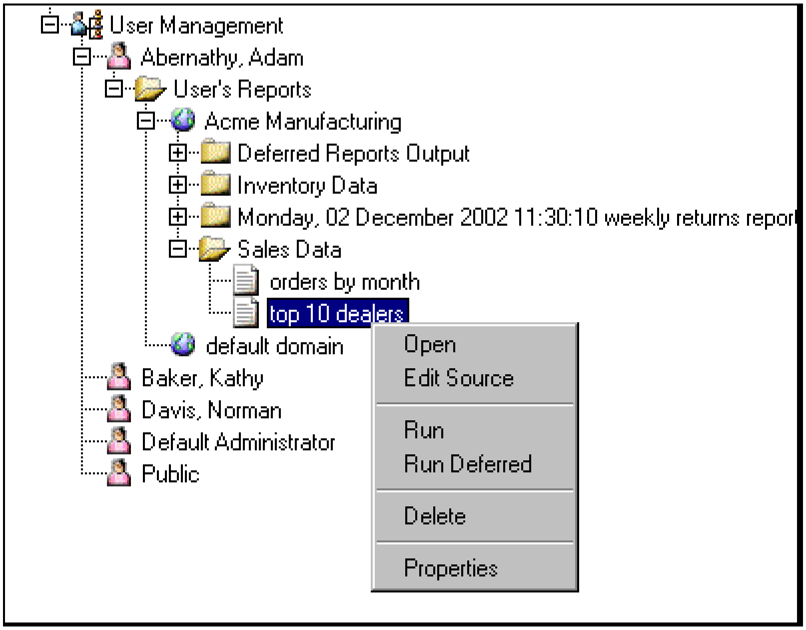


The Managed Reporting Administrator can access reports made by inactive users. This is so they can easily delete or review these reports.

Managing a User's Reports

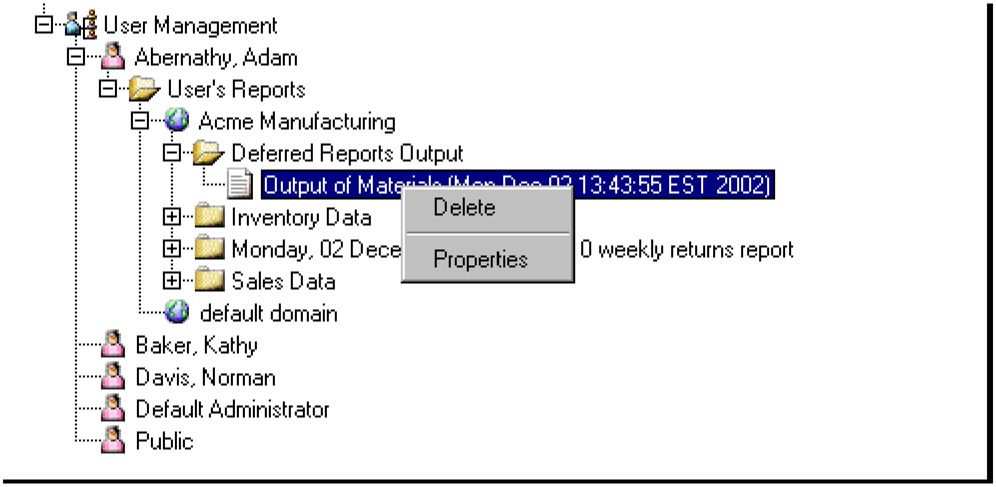
From the User Management tree object, Managed Reporting Administrators can perform the following tasks:

- Open the report. It displays in Report Assistant or Graph Assistant just as it does for the user. From there, you can make changes and either:
    - Save to the same file, or
    - Save As... a new file name (recommended because this leaves the original report untouched, which the user can view for comparison).
- Edit the source code for the report directly with the Java Editor. Do not alter the internal Dialogue Manager code in the procedure or the report may not run.
- Run the report.
- Run the report deferred.
- Delete the report. A confirmation displays before the file is removed.
- View and change properties. For example, a report can be unshared.
- Access the deferred output using the Deferred Status option. The report can be Run Deferred, but will be run using the Managed Reporting Administrator's user ID.



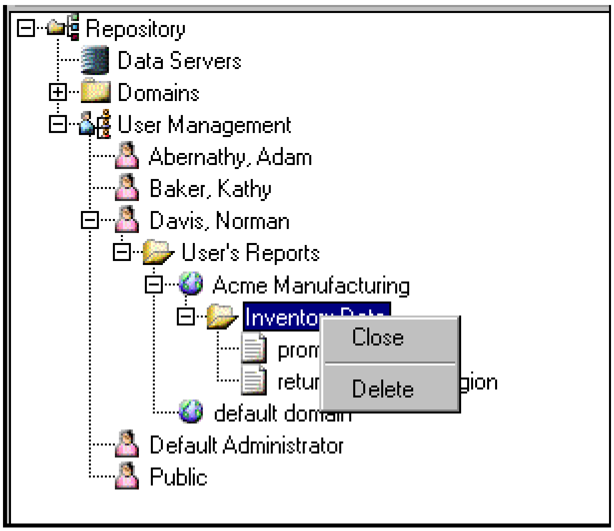
Note: The report runs with the WebFOCUS Server ID of the Managed Reporting Administrator, not the user, which may produce different report results.

For finished output such as saved deferred output and distributed ReportCaster output, the options are different as shown below:



The finished output cannot be opened, run, run deferred, or edited because it may contain secured data that is only visible to the user who ran the report initially. However, it can be deleted and its properties can be changed.

Folder options include Close and Delete.



If delete is selected, a confirmation displays before deleting all the user's reports in this folder.

When you are logged in to Domain Builder as a Managed Reporting Administrator, you view a snapshot of information available in User Management. However, Managed Reporting is a dynamic system. Users, domains, and reports are constantly being added, deleted, or changed. In order to view the most recent status, you can use the refresh options below:

- **Reload User Management.** Refreshes the list of users.
- **Reload User.** Refreshes the list of domains to which the user has access.
- **Reload Domain.** Refreshes the list of reports this user has created for this domain.

CHAPTER 8

Creating Public and Group Views

Topics:

- What Is a Public View?
- What is a Group View?
- Adding a Public or Group View
- Removing a Public or Group View
- Editing a Public or Group View
- Copying a Public or Group View
- Exiting the Public Views or Group Views Window

A public view allows users to view information in Dashboard without entering login information. Login information is managed in the Dashboard from the Server window in the View Builder. For details, see Chapter 9, *Customizing Dashboard*.

There are two types of public views, general and custom. The general public view is the default public view and is intended for a wide variety of audiences. Custom public views can contain detailed information that is relevant to more specific groups.

Group views are secure views that can deliver information to a specific group of users.

You create and manage public views (general and custom) and group views from the Public Views and Group Views windows in the View Builder. From the Public/Group Views windows you can add, remove, edit or copy a public or group view.

After you create a public or group view you need to add content. For details, see Chapter 11, *Creating a Content Block*.

Note: Public Users who access any public view (general or custom) or group view will only be able to view information. They will not be able to change information or the look of the Dashboard.

What Is a Public View?

A public view allows public users to view information in the Dashboard without having to enter login information. A default public view is provided with Dashboard and allows you to build additional custom public views that can contain specific reports and information for a particular group of users. For example, you can create a Human Resources public view that will contain information that is pertinent to someone who works in that particular group, and an Accounting public view that will only contain information for that particular group.

Each public view can contain different content blocks, and you can create a unique customization for each public view.

From the Dashboard index page, you can access the Public Views window. The Public Views window lists all of the existing public views. From this page, users can navigate from one public view to another by clicking the links on the page. Alternatively, you can give users one URL that directs them to the public view intended for their group.

What is a Group View?

A group view is similar to a public view in that a user does not need to enter login information to access the view. A group view is a view based on WebFOCUS Managed Reporting repository groups. When a user logs into Dashboard, they will be able to see all of the views that have been created for each group they belong to.

You can create a unique view for each group view. When you update a view the view will be updated for all members of the group, even if a member has logged into the Dashboard and created their own personal view.

Users cannot make any changes to group views. When a user logs into Dashboard, then they can personalize their view to add personal pages in addition to the group pages.

From the Dashboard index page, you can access the Group Views window. The Group Views window lists all of the existing group views. From this page, users can navigate from one group view to another by clicking the links on the page. Alternatively, you can give users one URL that directs them to the group view intended for them.

Adding a Public or Group View

You create a public or group view from the Public Views or Group Views window in the View Builder. (Note that the Public Views and Group Views window you access through the View Builder are different than the Public Views and Group Views windows you can access from the WebFOCUS Business Intelligence Dashboard index page.) When you create a public or group view, you must supply a description for the view. The name of your view is automatically generated and you can find it in the Link URL column.

The following folders, files, and links are created for each public and group view:

- A folder using the link URL name is created in the worp_users folder.
- A file called personal.xml is created in the same folder.
- A file of the same name is created in the worp_custom folder.

For each public and group view, a link is added to the Public Views and Group Views windows you can access from the WebFOCUS Business Intelligence Dashboard index page. The description defined for the public or group view when the view was created is the text for the link.

Note: When you enter the Public Views window for the first time, the default public view, entitled Public with the description General Public View displays. This view cannot be deleted although you can modify the description and the content blocks.

Procedure How to Add a Public View

1. Open the View Builder.
2. Click *Public Views*.
3. Click *Add*. An input form displays at the bottom of the Public Views window.
4. Enter a description for the public view.
5. Click *Submit*. The new view is added to the Public Views list.

Procedure How to Add a Group View

1. Open the View Builder.
2. Click *Group Views*.
3. Click *Add*. An input form displays at the bottom of the Group Views window.
4. Select a Group Name from the drop-down list.
5. Enter a description for the group view.
6. Click *Submit*. The new view is added to the Group Views list.

Removing a Public or Group View

From the Public Views or Group Views window, you can remove a public or group view. Note that you can remove one or more views at a time.

Procedure How to Remove a Public View

1. Open the View Builder and click *Public Views*.
2. Click the check box(es) next to the public view(s) you want to remove.
3. Click *Remove*. A message displays confirming the removal.
4. Click *OK*.

Procedure How to Remove a Group View

1. Open the View Builder and click *Group Views*.
2. Click the check box(es) next to the group view(s) you want to remove.
3. Click *Remove*. A message displays confirming the removal.
4. Click *OK*.

Editing a Public or Group View

After you create a public or group view, you can edit the description and the contents. For details on editing content blocks, see Chapter 11, *Creating a Content Block*.

Procedure How to Edit a Public or Group View's Description

1. Open the View Builder and click *Public Views* or *Group Views*.
2. Click the check box next to the public or group view you want to edit.
3. Click *Edit Content*. Edit the description by deleting the current description and entering a new one.
4. Click *Update*.

   For details on editing content blocks, see Chapter 11, *Creating a Content Block*. For details on editing a view's look, see Chapter 9, *Customizing Dashboard*.

Copying a Public or Group View

If you have an existing public or group view that contains content blocks you want to include in a new view, you can save time by copying the existing view. When you copy a view, a new public or group view is created that contains the same content blocks but has a different name and description. After you copy the existing view, you can edit the content blocks for the new public or group view.

You copy views from the Public Views or Group Views window. The text of the description is used as the link on the Public Views and Group Views pages.

Procedure How to Copy a Public View

1. Open the View Builder and click *Public Views*.
2. Click the check box next to the public view you want to copy.
3. Click *Copy*. An input form displays at the bottom of the Public Views window.
4. Enter a description for the new public view.
5. Click *Submit*. The new public view is added to the Public Views list.

   For details on content blocks, see Chapter 11, *Creating a Content Block*.

Procedure How to Copy a Group View

1. Open the View Builder and click *Group Views*.
2. Click the check box next to the group view you want to copy.
3. Click *Copy*. An input form displays at the bottom of the Group Views window.

4. Select a Group Name from the drop-down list.
5. Enter a description for the new group view.
6. Click *Submit*. The new group view is added to the Group Views list.

   For details on content blocks, see Chapter 11, *Creating a Content Block*.

Exiting the Public Views or Group Views Window

You exit the Public Views and Group Views window by clicking Done. When you click Done, you exit the Public Views or Group Views window and the WebFOCUS Business Intelligence Dashboard index page opens.

CHAPTER 9

Customizing Dashboard

Topics:

- Before You Begin
- Opening the View Builder
- Selecting a Template
- Selecting Custom Colors
- Positioning the Domain Tree, Role Tree, and Banner
- Inserting a Logo
- Customizing the Banner
- Creating a Custom Toolbar
- Adding a Message of the Day
- Selecting Login Options
- Setting a Password for the Public User
- Setting a Server User ID and Password for the Public User
- Resetting the View Builder
- Saving Selections and Exiting a Customization
- Exiting the View Builder

You can customize the WebFOCUS Business Intelligence Dashboard by choosing colors, adding a logo, selecting the position of the Domain Tree, Role Tree, and banner, and more. To customize the WebFOCUS Business Intelligence Dashboard, you use the View Builder.

You can create a unique customized view for each public and group view.

Before you begin, you must create the public user. For details, see *Before You Begin* on page 9-2.

When you open the View Builder after upgrading from a previous version of Dashboard, the following message displays:

```
The View Builder is now migrating the existing
customization and personalizations to the new
version. Please wait.
```

Before You Begin

Before you create a public or group view or begin to customize the WebFOCUS Business Intelligence Dashboard, the public user must exist. The public user is set up to allow users to view information without having to enter a user ID or password. In addition, the public user will have access to the WebFOCUS Managed Reporting domains you associate with that user. The public user has limited access to Dashboard. For details, see *Public User Rights* on page 9-2.

In most cases, the public user is automatically generated. To verify this, see the User Administration tool.

Reference Public User Rights

The public user can:

- View and run the contents of the Standard Reports folder for the domains available to the user. The user can only execute reports contained in this folder.
- Perform a Domain Search, although the Look In option is not available to the user. You can remove the Domain Search option from a public view.

The public user cannot:

- Create content blocks or content pages.
- Access reporting tools, such as Report Assistant, Graph Assistant, ReportCaster, or Library.
- Access the My Reports, Shared Reports, or Reporting Objects folders.
- Save report output or report requests to a domain.
- Run deferred requests or view deferred status.

Opening the View Builder

You can customize your Dashboard look using the View Builder. From the View Builder, you can open the following windows:

- **Look.** Select a template for Dashboard.
- **Colors.** Select custom colors for your template.
- **Composition.** Select the position of the Domain Tree, Role Tree, and the banner.
- **Logo & Links.** Select an image, for example, a company logo, for the banner. You can also customize the links that display in the banner of the public view.
- **Message.** Add a customized Message of the Day to your Dashboard view.

- **Toolbar.** Add a customized toolbar to your Dashboard view that contains any type of link that the Internet or intranet supports, such as Web sites, other tools, applications, and documents.
- **Toolbox.** Create toolboxes that contain the items you want to insert in your custom content tool bar.
- **Login.** Select the login options, dual or single, for each public or group view.

Only one session of the View Builder can be open at any time. If you try to access the View Builder while another administrator is using it, you will receive the following message:

```
A customization is currently in progress.
```

Note: Do not use your browser's Back and Forward buttons to navigate in the View Builder. Instead, use the links provided on the left side of the View Builder.

Procedure How to Open the View Builder to Customize a View

1. Enter the following URL in your Web browser

   `http://webserver [:portnumber]/ibi_apps/bid`

   where:

   `webserver`

   Indicates the name of the Web server that runs Dashboard.

   `portnumber`

   Is the Web server port WebFOCUS is running on. This is not required if it is the default port.

   The WebFOCUS Business Intelligence Dashboard Index Page opens.

   Alternatively you can enter

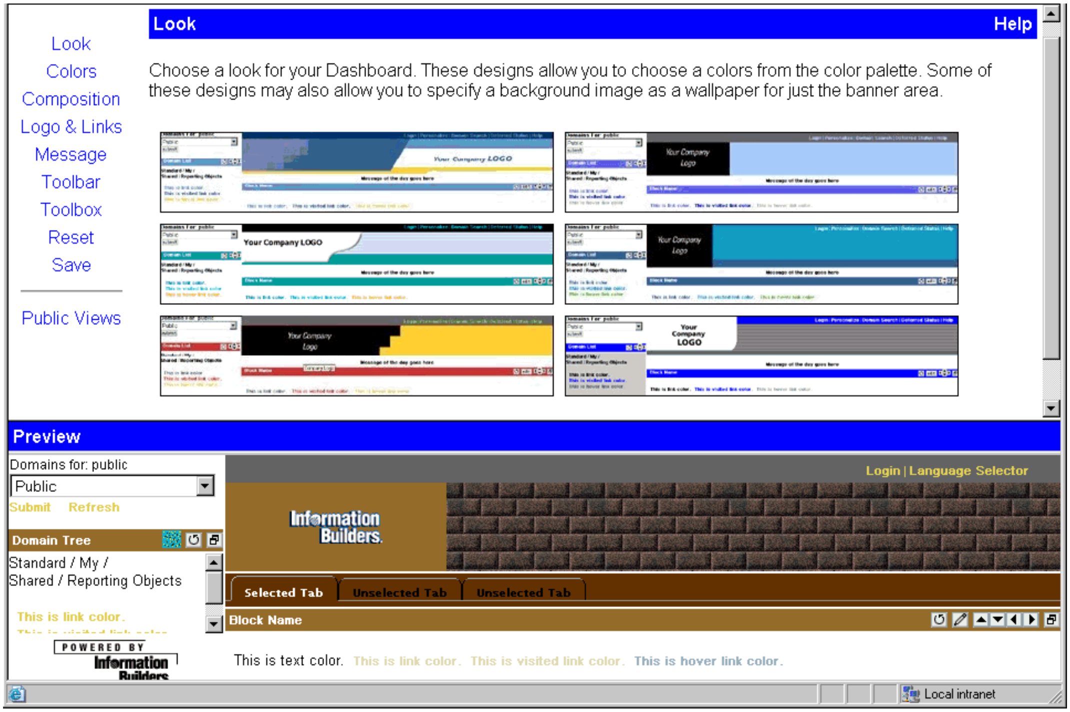
   `http://webserver [:portnumber]/ibi_apps/bid/vb`

   to directly access the View Builder Login Page.

2. Click *WebFOCUS BI Dashboard View Builder Login Page*.
3. Enter your user ID and password.
4. Click *Submit*. The Public Views window opens. If you want to customize a group view, click Group Views.
5. Select the check box next to the public or group view you want to customize.
6. Click *Edit Look*.

Selecting a Template

You can select a template for the Dashboard interface from the Look window in the View Builder. You can select a different template for each public and group view.



There are several templates available, each with different options. The options include selecting custom colors and selecting a background image. For descriptions of all the templates, see *Dashboard Templates* on page 9-5.

Procedure: How to Select a Template

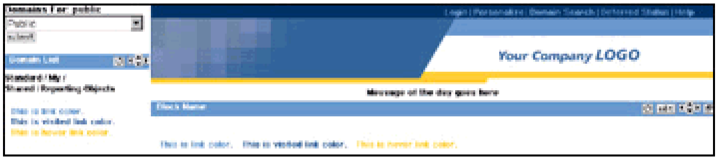
1. From the View Builder, click *Look*. The Look window opens.
2. Click an image in the Look window. The selected template will automatically display in the Preview area.
3. Click *Colors* to change the colors for the look. For details, see *Selecting Custom Colors* on page 9-6.

Reference Dashboard Templates

Following are the templates available for Dashboard. The numbers correspond to the thumbnail images in the Look window from top to bottom in the left column (templates 1-3) and top to bottom in the right column (templates 4-6).

Template 1

The colors for this template are completely customizable.



Template 2

The colors for this template are completely customizable. You may also use an image for a wallpaper effect in the banner background area.

Template 3

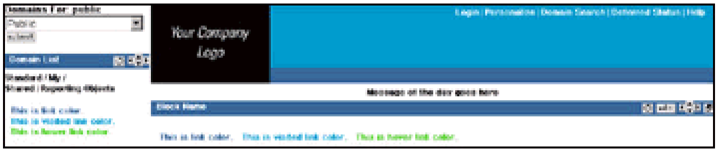
The colors for this template are completely customizable.

Template 4

The colors for this template are completely customizable. You may also use an image for a wallpaper effect in the banner background area.

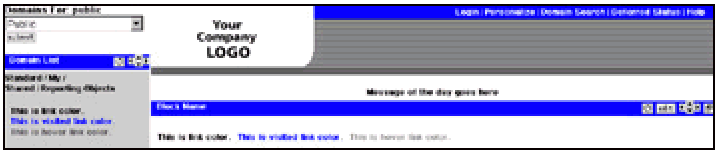
Template 5

The colors for this template are completely customizable. You may also use an image for a wallpaper effect in the banner background area.



Template 6

The colors for this template are completely customizable.

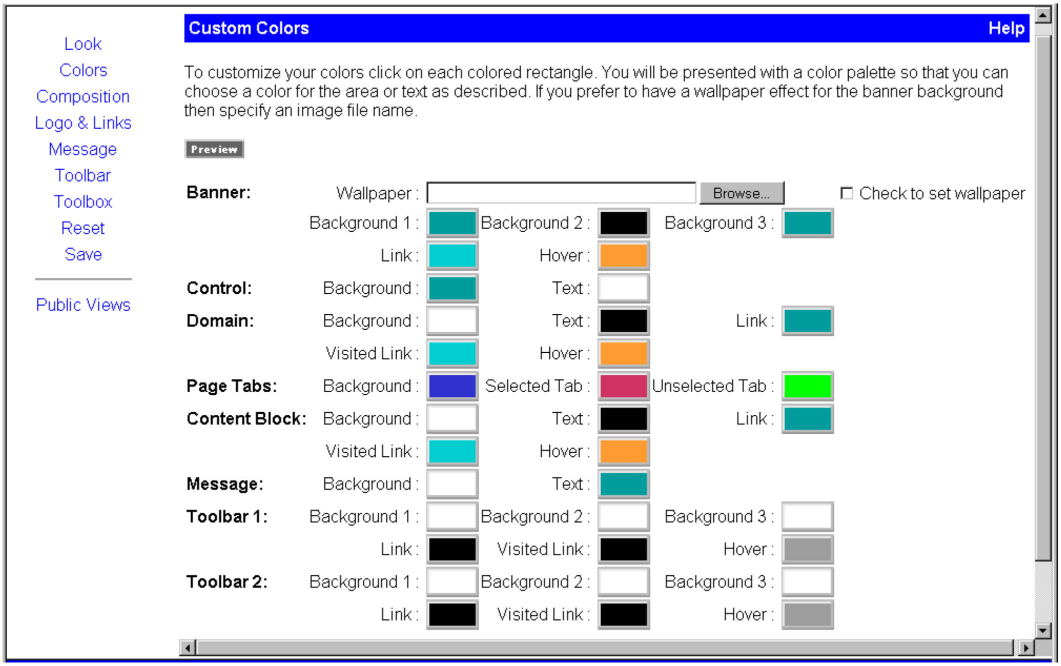


Selecting Custom Colors

You can customize the templates by selecting colors (or images, where applicable) for the following areas:

- **Banner.** You can select the background colors, and the text and link color for the banner. If you have selected template 2, 4, or 5 you can alternatively select an image to create a wallpaper effect for the banner background area instead of a color.
- **Control.** You can select the background color and text color for the Domain Tree, Role Tree, and content block control bars.
- **Domain.** You can select the domain background color, text color, and link colors.
- **Page Tabs.** For content pages, you can select the background color for the page tab, and the text color for the selected and unselected page tabs.
- **Content Block.** You can select the content block background color and link colors. Note you can only select colors for list blocks and folder blocks.
- **Message.** You can select the background color and the text color for the message.
- **Toolbar 1 and Toolbar 2.** You can select the background colors and the link colors for any custom tool bars you create.

Note: Depending on the template you have selected, certain items may not appear on the Custom Colors window.



The color areas (for example, Background 1) vary for each template. For details, see:

- *Banner Custom Color Areas* on page 9-9.
- *Control Bar Custom Color Areas* on page 9-9.
- *Domain Custom Color Areas* on page 9-10.
- *Page Tabs Custom Color Areas* on page 9-10.
- *Content Block Custom Color Areas* on page 9-10.
- *Message Custom Color Areas* on page 9-11.
- *Toobar 1 and Toolbar 2 Custom Color Areas* on page 9-11.

Procedure How to Choose Custom Colors for a Template

1. From the View Builder, click *Colors*. The Custom Colors window opens.
2. Click the colored rectangle adjacent to the area you wish to select color for.

   The Color Palette window opens:

3. Click a color from the palette or enter a hex value in the area provided. The hex value is not case sensitive. You are not limited to the colors that appear in the Color Palette window; you can use any color you wish by entering the hex value.
4. Click *Done* to close the Color Palette window and save changes. Click *Close* to close the Color Palette window without saving changes.

   You return to the Custom Colors window.

5. Click *Preview* to see how the colors display.
6. Click *Save* to save changes.

Reference Banner Custom Color Areas

The color areas for the banner are:

Custom Color Area	Designates...
Background 1	The area that does not contain a logo or links for templates 2, 3, 4, and 5. In templates 1and 6, it is the area behind the links.
Background 2	In template 1 it is the narrow bar above “Your Company LOGO”. The area behind the links in templates 2, 3, and 4. In templates 5 and 6, it is the narrow bar at the bottom of the banner.
Background 3	In templates 1 and 3 it is the narrow bar below “Your Company LOGO”. In template 2 it is the bar beneath background area 1. The logo area in templates 3, 4, and 5. This is not applicable in template 6.
Background 4	In template 1, the area behind “Your Company LOGO”. In template 3, the line between “Your Company LOGO” and the link bar. This is not applicable for templates 2, 4, 5, and 6.
Background 5	In template 3, the line between “Your Company LOGO” and the message of the day. This is not applicable for templates 1, 2, 4, 5, and 6.
Link	The text color for links in the banner.
Hover	The text color for links when the cursor is positioned over the link.

Reference Control Bar Custom Color Areas

The color areas for the control bar are:

Custom Color Area	Designates...
Background	The color of the control bar at the top of the Domain Tree, Role Tree, and content blocks.
Text	The content block name.

Reference Domain Custom Color Areas

The color areas for the domain are:

Custom Color Area	Designates...
Background	The background color behind the Domain Tree. This is also the background color for the Domain Tree that opens when a user selects the Tree link in the banner.
Text	The color of the text in the Domain Tree, including folder names.
Link	The color of domain items such as links and reports.
Visited Link	The color of domain items such as links and reports after the link has been accessed.
Hover	The text color for domain items such as links and reports when the cursor is positioned over the item.

Reference Page Tabs Custom Color Areas

The color areas for page tabs are:

Custom Color Area	Designates...
Background	The background color for the content page tabs.
Selected Tab	The text color for the selected content page tab.
Unselected Tab	The text color for the unselected content page tabs.

Reference Content Block Custom Color Areas

The color areas for content blocks are:

Custom Color Area	Designates...
Background	The background color behind List and Folder blocks and Output blocks if the block is empty. It is also the background color for the Dashboard login page when accessed from a public or group view.
Link	The color of links displayed in List and Folder blocks.

Custom Color Area	Designates...
Visited Link	The text color for links in a List block after they have been accessed.
Hover	The text color for links in a List block when the cursor is positioned over the link.
Text	Folder names in a Folder block.

Reference Message Custom Color Areas

The color areas for the message are:

Custom Color Area	Designates...
Background	The background color for the Message of the Day block.
Text	The color of the Message of the Day text.

Reference Toobar 1 and Toolbar 2 Custom Color Areas

The color areas for toolbar 1 and toolbar 2 are:

Custom Color Area	Designates...
Background 1	The area behind the text.
Background 2	The tool bar item outline.
Background 3	The tool bar background (the area behind the items in the tool bar).
Link	The text color of links in the tool bar.
Visited Link	The text color for links in the tool bar after they have been accessed.
Hover	The text color for links in the tool bar when the cursor is positioned over the link.

Procedure How to Create a Wallpaper Effect in a Template

1. From the View Builder, click *Colors*. The Custom Colors window opens.

   You can only add a wallpaper effect in templates 2, 4, and 5.

2. Enter the location of the image in the space provided or click *Browse* to search for the image. Note that the image must be a GIF, JPG, or BMP file.

   If the image is smaller than the banner area, it will be repeated to fill the area.

3. Click the *Click to Set Wallpaper* check box only if you are changing the image or removing the image.

4. Click *Preview* to view how the image will display. The Preview window must be updated before exiting the Custom Colors window or your changes will not be saved.

   The selected image file will be copied to the WebFOCUS directory for access while running Dashboard. If the image file is modified in its original location you will need to reinsert the image from Dashboard; it will not be automatically updated.

   The name of the image will not display when you re-enter the View Builder.

5. Click *Save* to save changes.

Positioning the Domain Tree, Role Tree, and Banner

You select the position of the Domain Tree, Role Tree, and banner from the Composition window. The Domain Tree and Role Tree share a column that can be placed on the right or left side of the window, or removed. The banner can be placed at the top or bottom of the window, or removed.

Note: The composition should not be updated when users are connected to Dashboard.

You choose to hide or display the Domain Tree, Role Tree, and banner. Display options include the following:

- **Check to use Banner.** When this option is selected, the banner will display in your Dashboard view. If you deselect this option, the banner will not display. Note that if you remove the banner, authenticated users will not have access to links they may need, such as Login and Personalize.

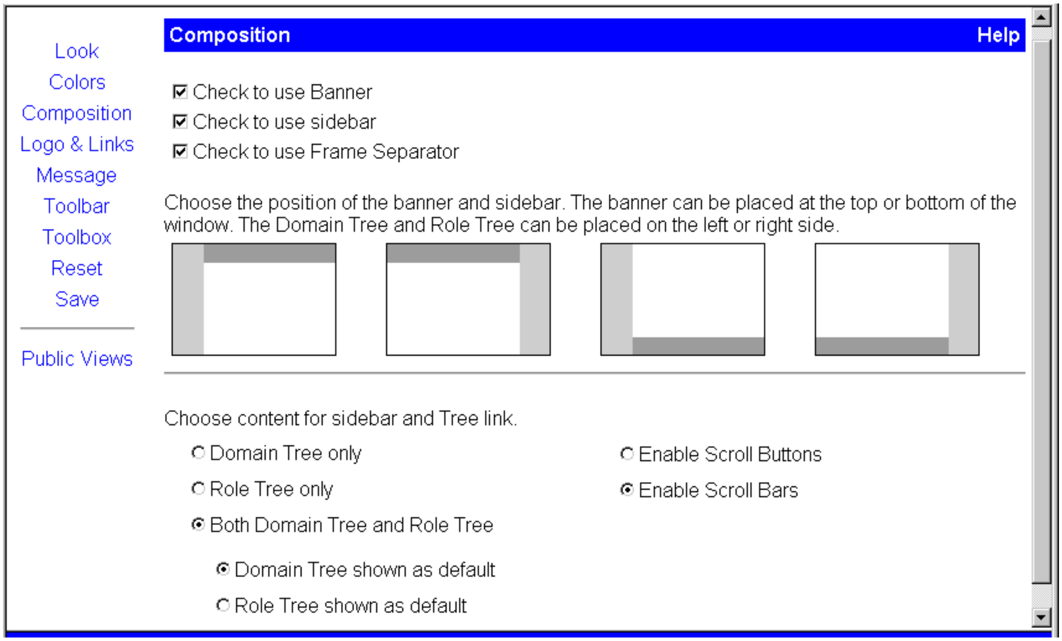
- **Check to use Sidebar.** When this option is selected, the sidebar (Domain Tree and Role Tree) display in your Dashboard view. If you deselect this option, the sidebar is hidden in your Dashboard view. Note that if you hide the Domain Tree/Role Tree, users can still access the Domain Tree/Role Tree from the Tree banner link.

- **Check to use Frame Separator.** Choose to keep or omit frame separators from the Dashboard view. If you omit frame separators, a seamless look is created between the banner and the sidebar (Domain/Role Tree).

- **Domain Tree only.** This is the default selection and displays only the Domain Tree.
- **Role Tree only.** Displays only the Role Tree.
- **Both Domain Tree and Role Tree.** Displays the Domain Tree and the Role Tree. When this option is selected, a button displays in the control bar that allows the user to toggle between the Domain Tree and the Role Tree. With this option you also select to have either the Role Tree or the Domain Tree as the default display list.

If you choose to display the Role Tree, you must create a Role Tree for all groups that will use the Dashboard view that contains a Role Tree. For details, see Chapter 10, *Creating a Role Tree*.

You can also select either scroll buttons or scroll bars for the Domain Tree and Role Tree. For details, see *Selecting Scrolling Options for Domain Trees and Role Trees* on page 9-14.



Procedure How to Position the Domain Tree, Role Tree, and Banner

1. From the View Builder, click *Composition*. The Composition window opens.
2. To position the banner, click one of the combinations in the Composition window. The banner can be placed at the top or bottom of the window, and the Domain Tree and Role Tree share a column on the right or left side of the window. Not all combinations are available for every display option.

   The Preview area updates automatically when you select a combination.

3. To position the Domain Tree and Role Tree, select one of the following radio buttons:
    - **Domain Tree only.** Displays only the Domain Tree.
    - **Role Tree only.** Displays only the Role Tree.
    - **Both Domain Tree and Role Tree.** Displays the Domain Tree and the Role Tree. When this option is selected, a button displays that allows the user to toggle between the Domain Tree and the Role Tree. With this option you also select to have either the Role Tree or the Domain Tree as the default display list.

    Note that this also controls the content that displays when a user selects the Tree banner link.

4. Click *Save* to save changes.

Selecting Scrolling Options for Domain Trees and Role Trees

You can select either scroll buttons or scroll bars for the Domain Tree and Role Tree.

When scroll buttons are enabled, up, down, left and right arrows display in the control bar allowing you to navigate the Domain Tree, or Role Tree.

When scroll bars are enabled, scroll bars display when content exists that cannot be viewed within the displayed window. When this option is selected, scroll buttons do not display in the control bar.

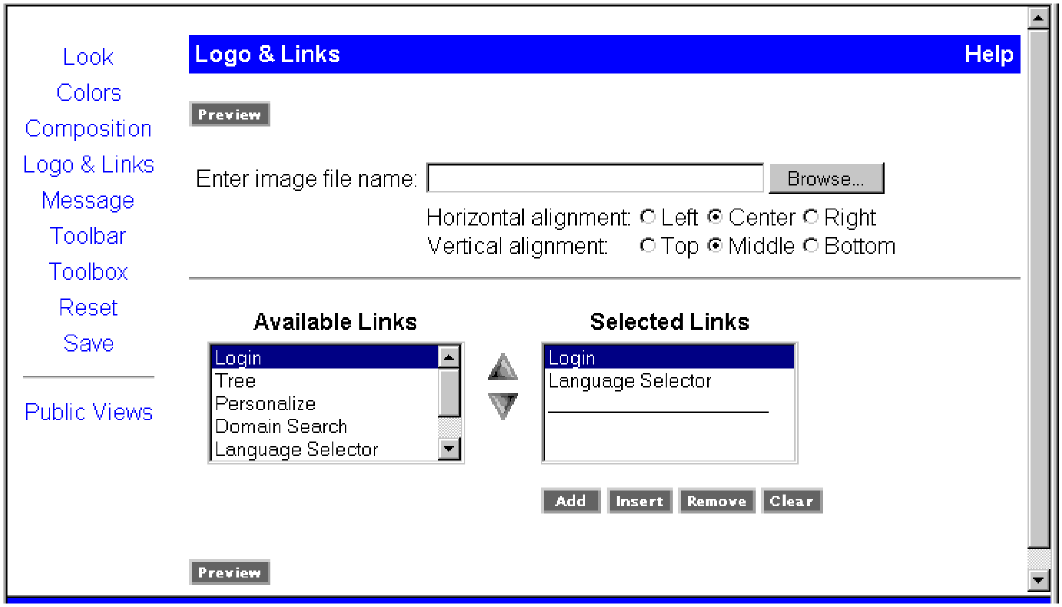
Procedure How to Select Scrolling Options for Domain Trees and Role Trees

1. From the View Builder, click *Composition*. The Composition window opens.
2. Select the *Enable Scroll Buttons* or *Enable Scroll Bars* radio button. This controls scrolling options in the sidebar list. When:
    - Enable Scroll Buttons is selected, the buttons will display in the Domain Tree or Role Tree control bar.
    - Enable Scroll Bars is selected, a scroll bar will display in the sidebar list when necessary.

Inserting a Logo

From the Logo & Links window you can insert an image, for example, a company logo, in the banner. The selected image file will be copied to the WebFOCUS directory for access while running Dashboard. If the image file is modified in its original location, you will need to reinsert the image from Dashboard; it will not be automatically updated.

The logo image must be a GIF, JPG, or BMP file. The logo size is determined by the size of the available space on the banner, and therefore, is different for the various templates. For details, see *Logo Size* on page 9-16.



Reference Logo Size

The following table provides information about the maximum height and width supported for the logo in each template.

Look Template #	Height (pixels)	Width (pixels)
1	48	413
2	53	207
3	74	354
4	80	200
5	91	160
6	64	188

Procedure How to Insert a Logo

1. From the View Builder, click *Logo & Links*. The Logo & Links window opens.
2. Enter the location of the image in the space provided or click *Browse* to search for the image.

   Note that the image must be a GIF, JPG, or BMP file.
3. Select the horizontal alignment for the logo image from the *Left*, *Center*, or *Right* radio buttons. The default is Center.
4. Select the vertical alignment for the logo image from the *Top*, *Middle*, or *Bottom* radio buttons. The default is Middle.
5. Click *Preview*.
6. Click *Save* to save changes.

Customizing the Banner

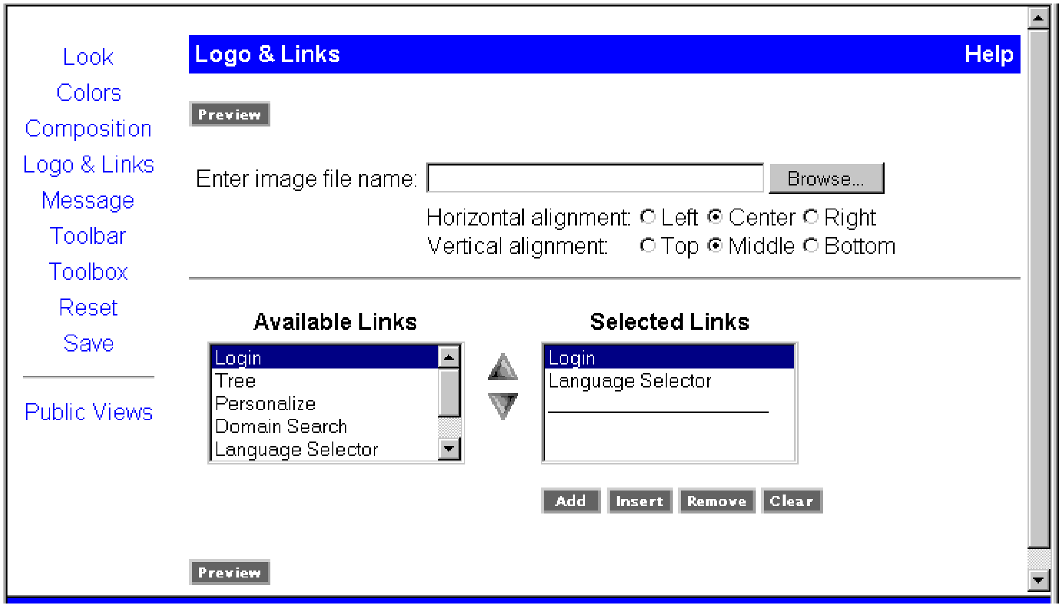
You can customize the links that display in the banner area for the public user. You can also customize the height of the banner, or remove the banner.

By default, the only links available to the public user are the Login and Language Selector links. From the Logo & Links window in the View Builder, you can customize the display of all links that are available to the public user. The links that are not available to the public user are Deferred Status, Options, Views, Recent, Favorites, Library and Report Caster. The order the links display in the Selected Links list is the order they will display in Dashboard.

When a user logs into Dashboard with a valid ID and password, all available links will display.

Note:

- The Language Selector link only displays if you have installed multiple languages.
- Customizing links is not available when creating a customized view of Dashboard for a group view.



Procedure How to Add Links to the Banner

1. From the View Builder, click *Logo & Links*. The Logo & Links window opens.
2. Highlight the link you want to add in the Available Links list.
3. Click:
    - *Add*, to add a link to the bottom of the Selected Links list.
    - *Insert*, to insert a link above the highlighted position in the Selected Links list.

    The order the links are displayed in the Selected Links list is how they will be displayed in Dashboard. You can move the links using the up and down arrows between the Available Links and Selected Links lists.
4. Click *Preview*.
5. Click *Save* to save changes.

Procedure How to Remove Links From the Banner

1. From the View Builder, click *Logo & Links*. The Logo & Links window opens.
2. Highlight the link you want to remove from the Selected Links list.
3. Click *Remove*. The link is removed from the Selected Links list.
4. Click *Preview*.
5. Click *Save* to save changes.

Procedure How to Clear All Links From the Banner

1. From the View Builder, click *Logo & Links*. The Logo & Links window opens.
2. Click *Clear*. All of the links in the Selected Links list clear, including the default Login link.
3. Click *Preview*.
4. Click *Save* to save changes.

Procedure How to Remove the Banner

1. From the View Builder, click *Composition*.
2. Deselect the *Check to use Banner* check box.
3. Click *Preview*.
4. Click *Save*.

Procedure How to Change the Banner Height

1. Open the profile.prf file for editing. This file is located in WebFOCUS52/worp/worp_html/ in one of the following folders:
   - worp0
   - worp1
   - worp2
   - worp3
   - worp4
   - worp5

   The number of the folder depends on the template you have chosen. To determine the number, hover your mouse over the template in the Look window. Alternatively, the numbers are in order (0-5) from left to right starting with the top left template.

2. Edit the bannerHeight section of the file to the desired height. The number represents the number of pixels for the banner height. The default value is 105.

Enter 0 to remove the banner.

3. Save and exit the profile.prf file.

Creating a Custom Toolbar

You can insert custom toolbars in Dashboard that can contain any type of link that the Internet or intranet supports, such as Web sites, other tools, applications, and documents. When a user clicks one of the links, a new browser window opens and displays the contents.

Toolbars can be placed in various positions in Dashboard and you can select different colors for the toolbars so they fit in with your Dashboard look. For details on selecting colors, see *Selecting Custom Colors* on page 9-6.

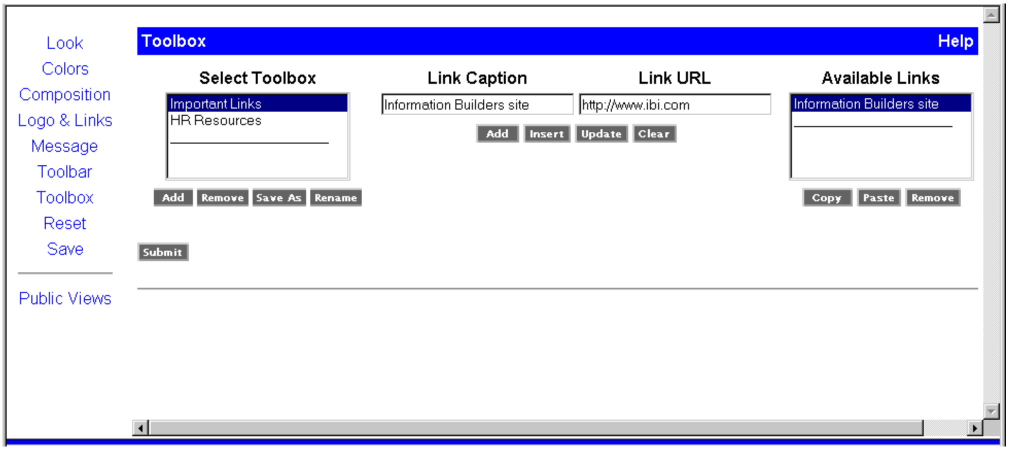
You can have up to 2 toolbars per Dashboard view. The number of items a toolbar can contain is only limited by the display space. Toolbars do not scroll, but you can maximize your space by positioning the toolbar appropriately (for example, a vertical toolbar can contain more items than a horizontal toolbar in most cases).

Since toolbars are created from items in your toolbox(es), you must create a toolbox before you create a toolbar. You can create as many toolboxes as you require and each toolbox can contain an unlimited number of items.

Once a toolbox is created, it is available in all public and group views.

Procedure How to Create a Toolbox

1. From the View Builder, click Toolbox. The Toolbox window opens.



2. In the Select Toolbox field, click *Add*.

3. Enter a name for the toolbox in the Explorer User Prompt dialog box and click *OK*.
4. In the Link Caption text box, enter the name for the link. This is the text that will display in the toolbar.
5. In the Link URL text box, enter the URL for the link in the format:

   `http://websitename`

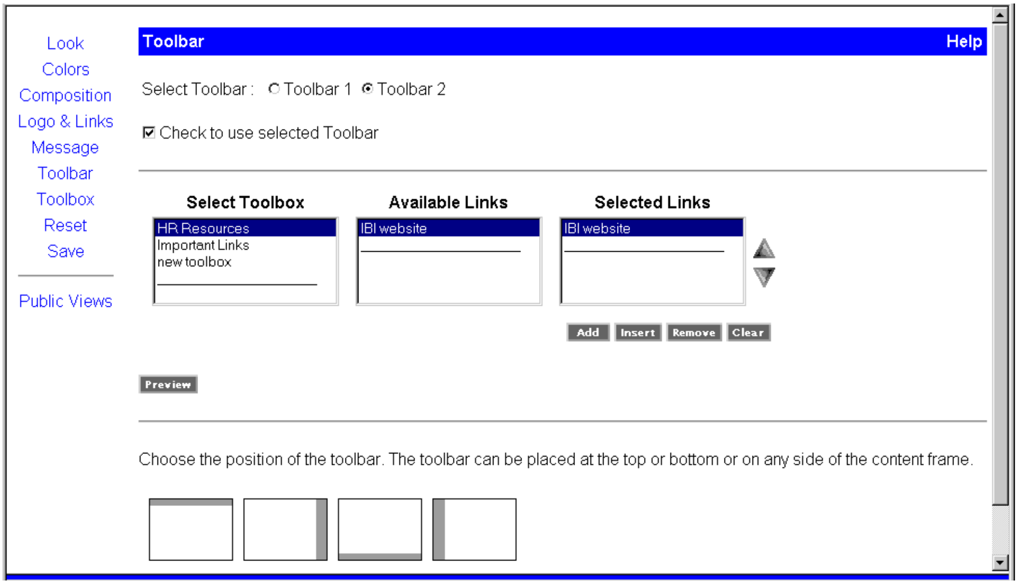
   For example, http://www.informationbuilders.com.
6. Click *Insert*. The link is added to the Available Links box.
7. Repeat steps 4-6 to add additional items to the toolbox. The number of items you can put in a toolbox is unlimited.
8. Click *Submit*.

Procedure How to Copy a Toolbox

1. From the View Builder, click *Toolbox*. The Toolbox window opens.
2. Highlight a toolbox from the Select Toolbox list and click *Save As*.
3. Enter a name for the new toolbox.
4. Click *OK*.

Procedure How to Create a Toolbar

1. From the View Builder, click *Toolbar*. The Toolbar window opens.



2. Click the *Toolbar 1* or *Toolbar 2* radio button.
3. Highlight a toolbox in the Select Toolbox list.
4. From the Available Links list, highlight a link and click *Add*.
5. Repeat steps 3 and 4 until your toolbar is complete.
6. Use the up and down arrows to position the order of the selected links.
7. Select the toolbar position (top, bottom, left or right) by clicking the appropriate image at the bottom of the Toolbar window (you may need to scroll down to view this).
8. Click *Save* to save your changes.

Adding a Message of the Day

You can add a message of the day that will display for public users and for authorized users. You can display any text message up to 100 characters. By default, the message is included in Dashboard. The message can be removed by deselecting the *Check to use Message of the Day* check box.

You can change the message of the day outside of the View Builder by editing the message.html file. This file is located in:

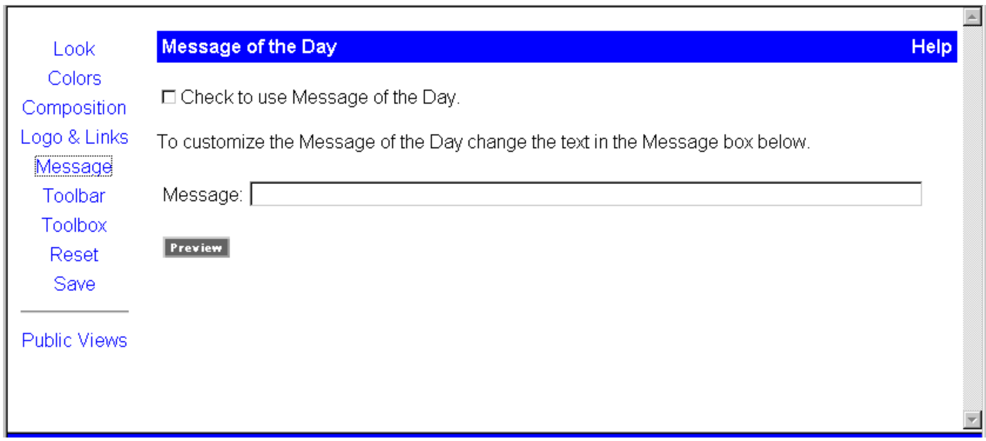
`drive:\ibi\WebFOCUS52\worp\worp_custom\dirname\message.html`

where:

dirname

Is public for the general public view. Otherwise it is the directory specified in the Public Views or Group Views window.

Open this file in any HTML editor and update the message text, which is the <TD element within the table.



Procedure How to Add a Message of the Day

1. From the View Builder, click *Message*. The Message of the Day window opens.
2. Enter the desired text in the Message text box. Note the message can contain up to 100 characters.
3. Click *Preview* to view the message in the preview area.
4. Click *Save* to save changes.

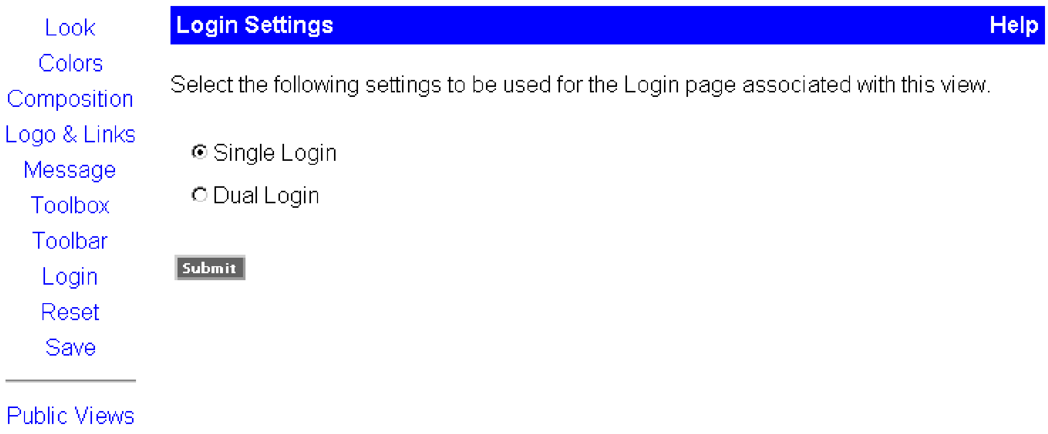
Selecting Login Options

From the Login Settings window in the View Builder, you can select the type of login (dual or single) for each public or group view. Single login is the default setting. The login window only displays when a user enters the:

- Login window from the Login link in the Dashboard banner.
- Login URL directly in their browser.
- View Builder login URL.

Single login requires only a valid Managed Reporting user ID and password. Dual login requires both a valid Managed Reporting user ID and password as well as a valid WebFOCUS Reporting Server user ID and password.

By default, only the single login (Managed Reporting login) is included in the login window. If you select the dual login setting for a public or group view, the dual login window appears only when a user enters the login window from the Login link in the Dashboard banner, or by using the URL that is specific to a group view.

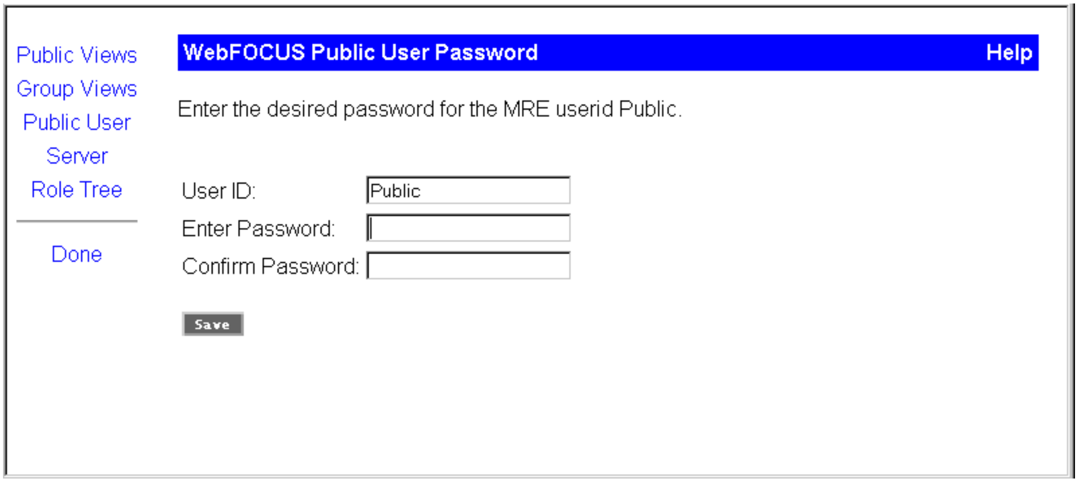


Procedure How to Select Login Options

1. From the View Builder, click *Login*.
2. Click the *Single login* or *Dual login* radio button.
3. Click *Submit*.
4. Click *Save*.

Setting a Password for the Public User

If you choose to restrict a public user's access to WebFOCUS Managed Reporting by setting a password when the public user is created, that password must also be stored in Dashboard to allow the user to view the public pages without entering a password. Setting the password is optional. However, if the password is set in WebFOCUS Managed Reporting, it must also be set in Dashboard to the same value.



Procedure How to Set the Public Password

1. From the View Builder, click Public User.
2. Enter the public user password in the Enter Password input box. This is the same value that was entered in the WebFOCUS Managed Reporting public user properties.
3. Enter the password again in the Confirm Password input box.
4. Click *Save*. A message displays indicating the user ID and password have been successfully saved.

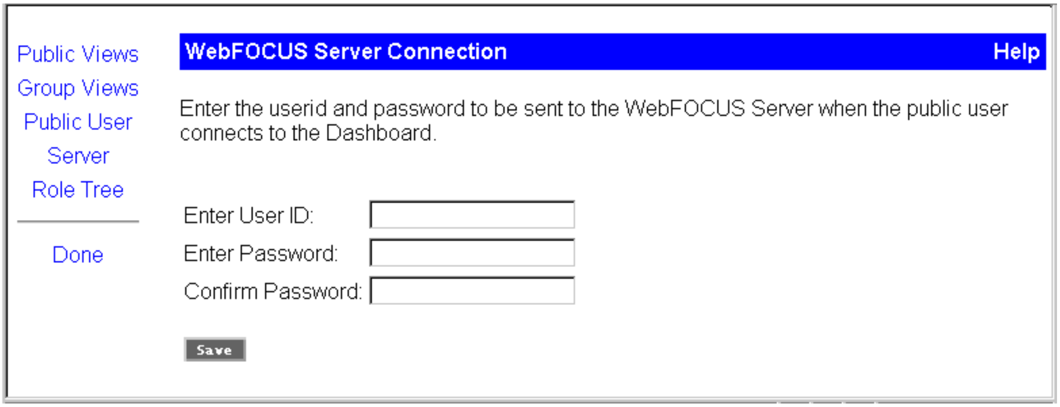
Note: The user ID and password are stored in encrypted format in the worp_mre.mpd file in the directory WebFOCUS52/worp/conf.

Setting a Server User ID and Password for the Public User

In the View Builder, you can set a user ID and password for the public user to connect to the default WebFOCUS Reporting Server without having to enter login information. Setting a user ID and password is optional. However, to allow public access to the default WebFOCUS Reporting Server through Dashboard without requiring a login window, a value must be set here.

The user ID and password entered here will be used for connecting to the default WebFOCUS Reporting Server. To set a different user ID and password to connect to alternate servers, the user ID and password must be set in the Server profile. For details, see Chapter 2, *Creating Domains and Standard Reports*.

Note: The View Builder does not attempt to match the user ID and password with a valid user ID and password for the WebFOCUS Reporting Server. This option is available to give you a way to set the value for the Dashboard public user without setting it for all WebFOCUS connections to the server.



Procedure **How to Set the Public User ID and Password**

1. From the View Builder, click *Server*.
2. Enter the user ID in the Enter User ID input box.
3. Enter the password in the Enter Password input box.
4. Enter the password again in the Confirm Password input box.
5. Click *Save*. A message displays indicating the user ID and password have been successfully saved.

   The user ID and password are stored in encrypted format in the worp_eda.epd file in the directory WebFOCUS52/worp/conf.

Resetting the View Builder

You can reset the View Builder to the last saved version. When you click the Reset button, the View Builder will revert to the last saved version, whether it is from the current session or from a previous session.

Saving Selections and Exiting a Customization

After you have finished your Dashboard customizations and have previewed the Custom Colors, Logo & Links, and Message of the Day, you can save your selections by clicking *Save* in the View Builder.

Note: Be sure you have clicked the Preview button in the Custom Colors, Logo & Links, and Message windows before you click Save in the View Builder. The selections you have made in these windows will not be saved if you have not clicked the Preview button in the respective window.

To exit the customization, select the Public Views or Group Views link from the side menu. You return to either the Public Views or the Group Views page.

If you click Public Views or Group Views before saving changes that were made in the Preview, a prompt displays asking whether the changes should be saved. You can save the changes by clicking OK, or discard the changes by clicking Cancel. These are only changes that have been made since the last time the Save link was selected.

Exiting the View Builder

Click Done to exit the View Builder. When you click Done, you will be logged out of Managed Reporting and the WebFOCUS Reporting Server, and any set cookies will be cleared. When you exit the View Builder, the Dashboard index page opens and displays links to the Dashboard views and the View Builder.

CHAPTER 10

Creating a Role Tree

Topics:

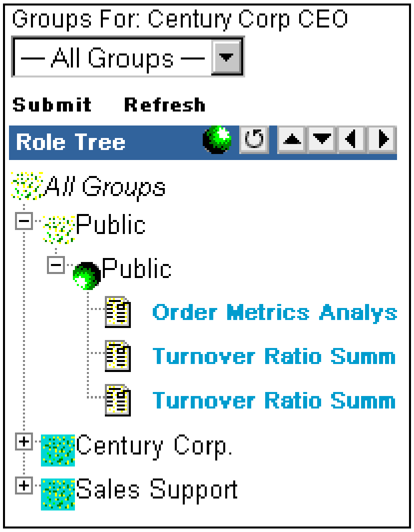
A Domain Tree contains all items in a domain including items from the Reporting Objects, My Reports, and Shared Reports folders. By contrast, Role Trees are created for WebFOCUS Managed Reporting User Groups and contain some or selected items from the domains to which the User Groups are associated.

For details, see *What Is a Role Tree?* on page 10-2.

What Is a Role Tree?

Role Trees allow Dashboard users access to items (reports, graphs, launch forms, and URLs) that have been associated with their Managed Reporting User Groups. The advantage of creating a Role Tree is that you can limit the items a user can access.

For example, if a user belongs to the Century Corporation and Public groups, they will only have access to the items in the Role Trees assigned to those groups.



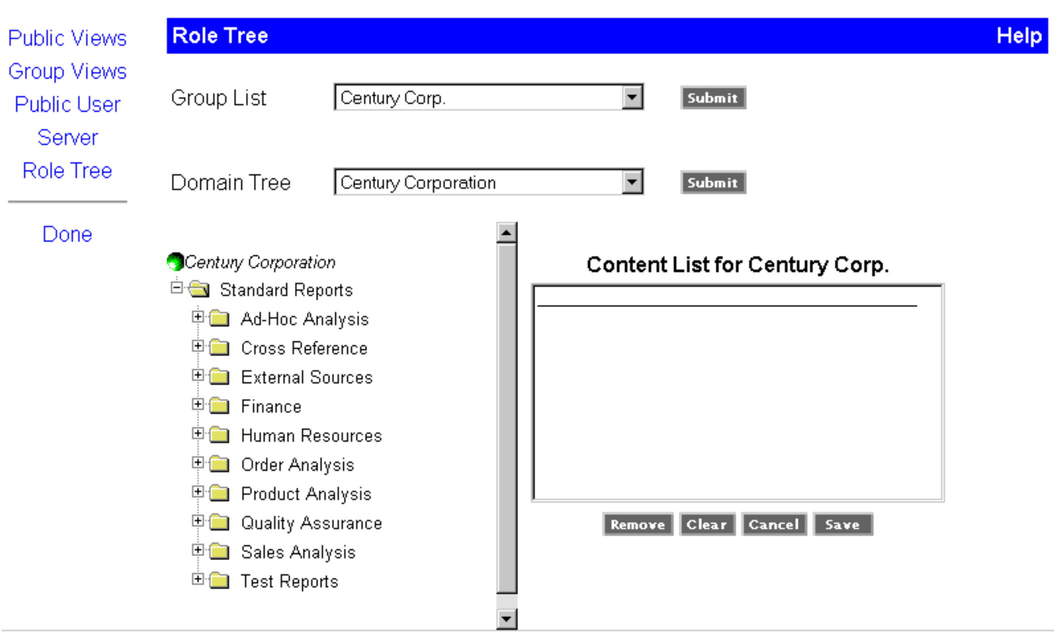
Role Trees display in the same area of the Dashboard as the Domain Tree. For details on managing the display of and positioning the Domain Tree and the Role Tree, see Chapter 9, *Customizing Dashboard*.

If you choose to display the Role Tree, you must create a Role Tree for all groups that will use the Dashboard.

Adding a Role Tree

You can create a Role Tree for any Managed Reporting User Group. To create a Role Tree, you select the:

- User Group.
- Domains. You can add items from more than one domain. Items are taken from the Standard Reports folder of the respective domain.
- Items (reports, graphs, launch pages, and URLs). Role Trees can only contain single items; folders cannot be added.



Procedure How to Add a Role Tree

1. From the View Builder, click *Role Tree*. The Role Tree window opens.
2. From the Group List, select a User Group and click *Submit*.
3. From the Domain Tree, select a domain and click *Submit*.
4. Expand the folders and click the items you want to add. Only items (reports, graphs, launch forms, URLs) can be added to a Role Tree. Folders cannot be added.
5. To add items from another domain, select a different domain from the Domain Tree and click *Submit*.

6. Expand the folders and click the items you want to add.
7. Repeat steps 5 and 6 as necessary.
8. Click *Save* when you have completed selecting items for the Role Tree for a particular User Group.
9. Click *Public Views* or *Group Views* to return to the respective page. Click *Done* if you want to exit the View Builder.

Editing a Role Tree

You can edit the Role Trees you have created for the User Groups by adding items, removing items, or clearing all items. If you need to cancel the Role Tree you are creating, click Cancel in the Role Tree window. The last saved Role Tree list appears.

Procedure How to Add Items to a Role Tree

1. From the View Builder, click *Role Tree*. The Role Tree window opens.
2. From the Group List, select the User Group's Role Tree you want to add items to and click *Submit*.
3. From the Domain Tree, select a domain and click *Submit*.
4. Expand the folders and click the items you want to add. Only items (reports, graphs, launch forms, URLs) can be added to a Role Tree. Folders cannot be added.
5. To add items from another domain, select the domain from the Domain Tree and click *Submit*.
6. Expand the folders and click the items you want to add.
7. Repeat steps 5 and 6 as necessary.
8. Click *Save* when you have completed adding items to the Role Tree for a particular User Group.
9. Click *Public Views* or *Group Views* to return to the respective page. Click *Done* if you want to exit the View Builder.

Procedure How to Remove Items From a Role Tree

1. From the View Builder, click *Role Tree*. The Role Tree window opens.
2. From the Group List, select the User Group's Role Tree you want to remove items from and click *Submit*.
3. In the Content List, click the item you want to remove. You can remove multiple items by holding down the Shift or Ctrl keys.
4. Click *Remove*.

5. Click *Save* when you have completed removing items from the Role Tree for a particular User Group.
6. Click *Public Views* or *Group Views* to return to the respective page. Click *Done* if you want to exit the View Builder.

Procedure How to Clear Items From a Role Tree

1. From the View Builder, click *Role Tree*. The Role Tree window opens.
2. From the Group List, select the User Group's Role Tree you want to clear all items from and click *Submit*.
3. Click *Clear*. All items are removed from the Content List.
4. Click *Save*.
5. Click *Public Views* or *Group Views* to return to the respective page. Click *Done* if you want to exit the View Builder.

Procedure How to Cancel Changes to a Role Tree

From the Role Tree window, click *Cancel*. The Role Tree window remains open and displays the last saved Role Tree list.

CHAPTER 11

Creating a Content Block

Topics:

Content blocks display when a user opens Dashboard. Content blocks can contain launched reports, links to reports, links to Internet resources, or output. The following are types of content blocks:

- Launch blocks.
- List blocks.
- Folder blocks.
- Output blocks.

When you create a content block, you select the block type, the block contents, the block layout, and the public or group view to which the block is associated.

The content blocks you create from the Public Views page will be the blocks available to the public user. The public user has limited access to Dashboard. For details, see Chapter 9, *Customizing Dashboard*. Content blocks created from the Group Views page will only display to members of that group.

When accessing Dashboard, an authenticated user will be able to add, edit, and remove content blocks from their personal view using the personalize feature.

You can create content pages in order to increase content space and organize Dashboard content. For details, see *Creating Content Pages* on page 11-3.

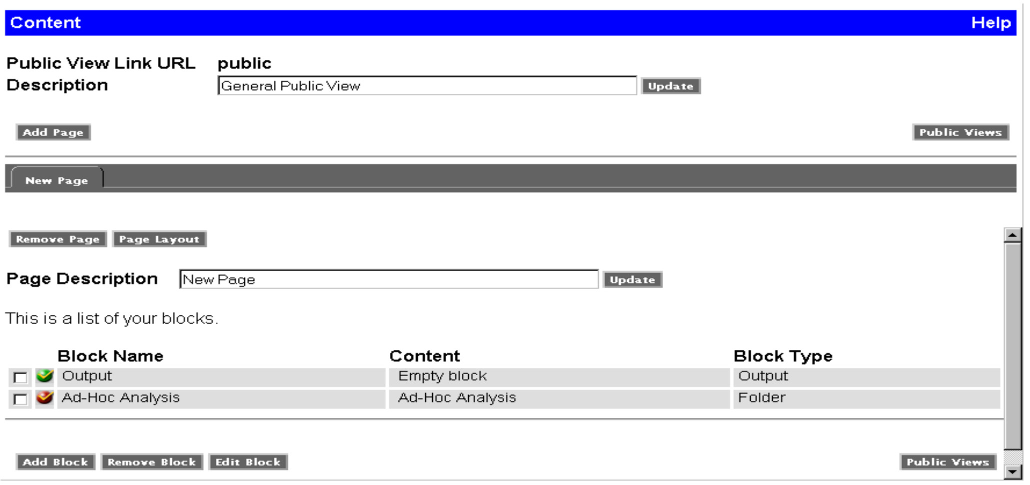
Content Window

From the Content window you create the content blocks that display in a public or group view. You can:

- Add content pages and content blocks.
- Remove content blocks.
- Edit content blocks.
- Select the content layout.
- Save changes.
- Update the content block description.

When you open the Content window, a list of the current content blocks appears. If you place your cursor over a content item, the full path of the procedure appears, including the domain name and folder name.

You access the Content window from the Public Views or Group Views window.



Procedure How to Open the Content Window

1. Enter the following URL in your Web browser

   `http://`*`webserver`*`/ibi_apps/bid`

   where:

   `webserver`

   Indicates the Web server that runs Dashboard.

   The WebFOCUS Business Intelligence Dashboard Index Page opens.

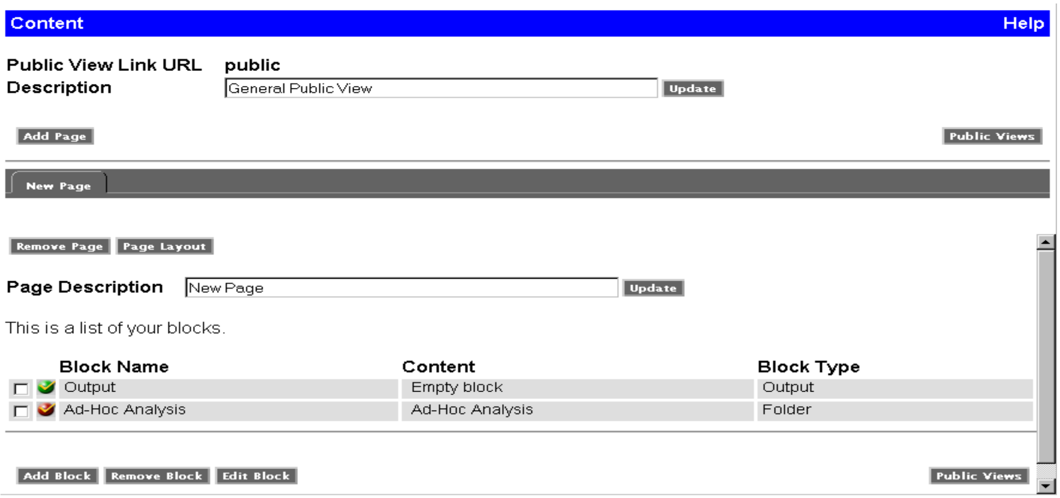
Alternatively you can access the View Builder Login page directly by entering:

`http://`*`webserver`*`/ibi_apps/bid/vb`

2. Click *WebFOCUS BI Dashboard View Builder Login Page*. The View Builder login window opens.
3. Enter your user ID and password.
4. Click *Submit*. The Public Views window opens. If you want to view the Group Views window, click *Group Views*.
5. Select check box next to the public or group view to which you want to add content
6. Click *Edit Content*. The Content window opens.

Creating Content Pages

You can create content pages for Dashboard that contain the content blocks you create. Content pages appear as tabs that display the name of the content page across the top of the content area. Pages can be viewed by clicking the appropriate tab.



Using content pages enables you to:

- Expand the amount of space you have to display content in Dashboard.
- Organize Dashboard content.
- Keep the default view that has been set up by the Dashboard administrator while at the same time create personalized content pages.

Multiple content pages are optional. When you are adding content blocks, if you only have one content page then tabs will not display in the actual Dashboard view.

You can create as many content pages as you need. You can also customize the color of content page tabs (background and text color) as well as design the layout. For details see Chapter 9, *Customizing Dashboard* and *Selecting Content Layout* on page 11-11.

When creating content pages, note that:

- You can rearrange the order of the pages using the Move Left, Move Right, and Set Default buttons in the Content window. The Set Default button promotes the current page to the first page.
- Only one output block is allowed per page.
- When Dashboard opens, only the reports on the content page that displays will execute. All other reports will execute when you click the respective content page tab.
- Reports on content pages will not automatically refresh when tabbing from one page to another. To refresh a report, click the Refresh button in the control bar.

Procedure How to Create Content Pages

1. From the Content window, click *Add Page*.
2. Enter the tab name in the Page Description text box.
3. Click *Update*.

   When a page is added, it is added as the last page. You can rearrange the order of the content pages using the Move Left, Move Right, or Set Default buttons. The Set Default button promotes the current page to the first page.

Adding a Content Block

From the Add a Block window, you create the content blocks the public or group user sees when they open Dashboard. Following are the types of content blocks you can create:

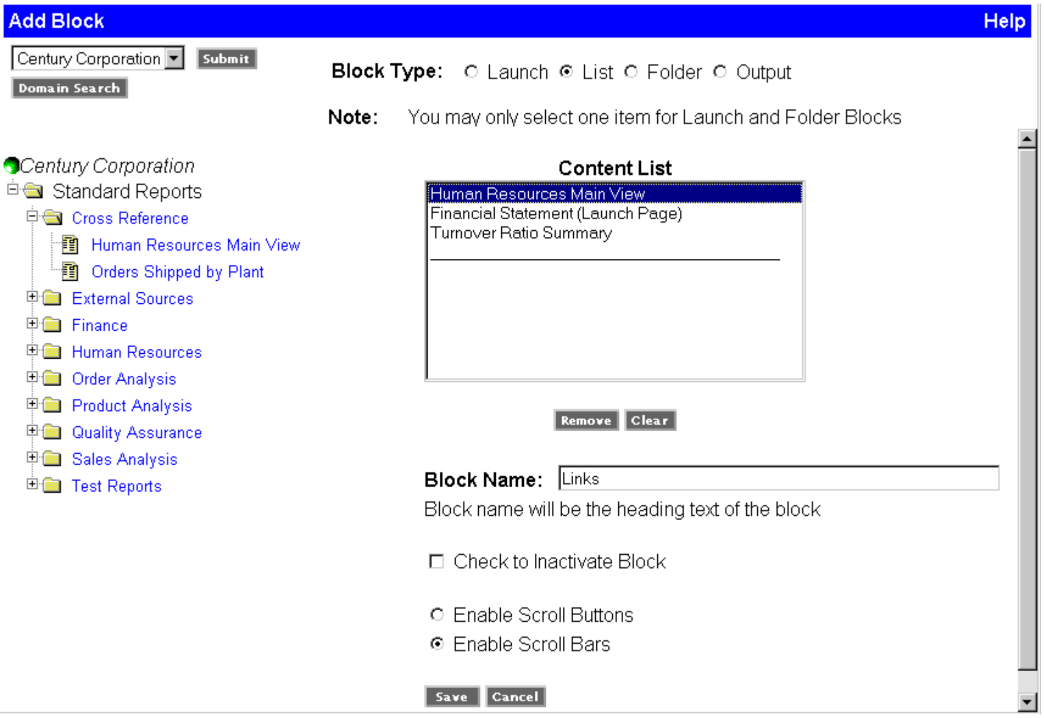
- **Launch blocks.** These can contain only one item. When a user opens Dashboard, the item automatically runs (or launches).
- **List blocks.** These can contain many items from one or many domains. The items can be from any folder in any domain to which the user has access. Users can run a report or access an Internet resource by clicking a link from the list.
- **Folder blocks.** These contain the entire contents of a folder (including its subfolders) that have been created in Managed Reporting. Only one folder can be added to a folder block. For a public view, you can only add folders from the Standard Reports folder. When the contents of an Managed Reporting folder are modified, the folder block in Dashboard is automatically updated to reflect any changes.

- **Output blocks.** These blocks can be created with or without default content. They are blocks where reports, graphs, or Web pages display. When a report is run or an Internet resource is accessed, the report output or Web page displays in the Output block. This is useful because a new browser window will not open each time a report or graph is executed, or a Web page is launched from a Domain Tree, Role Tree, List or Folder block. Instead, all content will display in the output block.

  When you create an output block, scrolling options are not available. Scroll bars will display when necessary.

Note: Some Web sites will bring their page to the top of a frameset when launched and take over the browser session. When these sites are opened in a launch or output block, Dashboard content will be lost. It is recommended that these types of Web sites not be selected for a launch or output block.

When you add items to a content block, you can use the Domain Search from the Add Block and Edit Block windows. For details, see *How to Add Items to a Content Block Using Domain Search* on page 11-6.



Procedure How to Add a Content Block

1. From the Content window, select the content page you want to add content to. If you need to add content pages, see *How to Create Content Pages* on page 11-4 for details.
2. Click *Add Block*. The Add Block window opens.
3. Select the *Launch block*, *List block*, *Folder block*, or *Output block* radio button.

   Note: If you are creating an Output block, steps 8 and 9 are optional since Output blocks do not require default output.
4. Select a domain from the drop-down list. You can also add items to a content block using Domain Search. For details, see *How to Add Items to a Content Block Using Domain Search* on page 11-6.
5. Click *Submit* to retrieve the contents of the selected domain.
6. Expand the domain folders you wish to select items from by clicking the plus sign (+) located next to the folder icon.
7. Click the items in the domain folders to populate the Content List.
8. Accept the default Block name or change the name in the Block name text box.
9. Select the *Enable Scroll Buttons* or *Enable Scroll Bar* radio button.
10. Click *Save* when you have finished selecting the content for your block.

Procedure How to Add Items to a Content Block Using Domain Search

1. From the Add Block or Edit Block window, click *Domain Search*.
2. Enter the criteria for your search and then click *Search*.
3. From the results on the right side of the window, click on an item to add it to your content block. View your content block to see the items you have added.

Removing a Content Block

From the Content window, you can remove a content block. Note that you can remove more than one content block at a time.

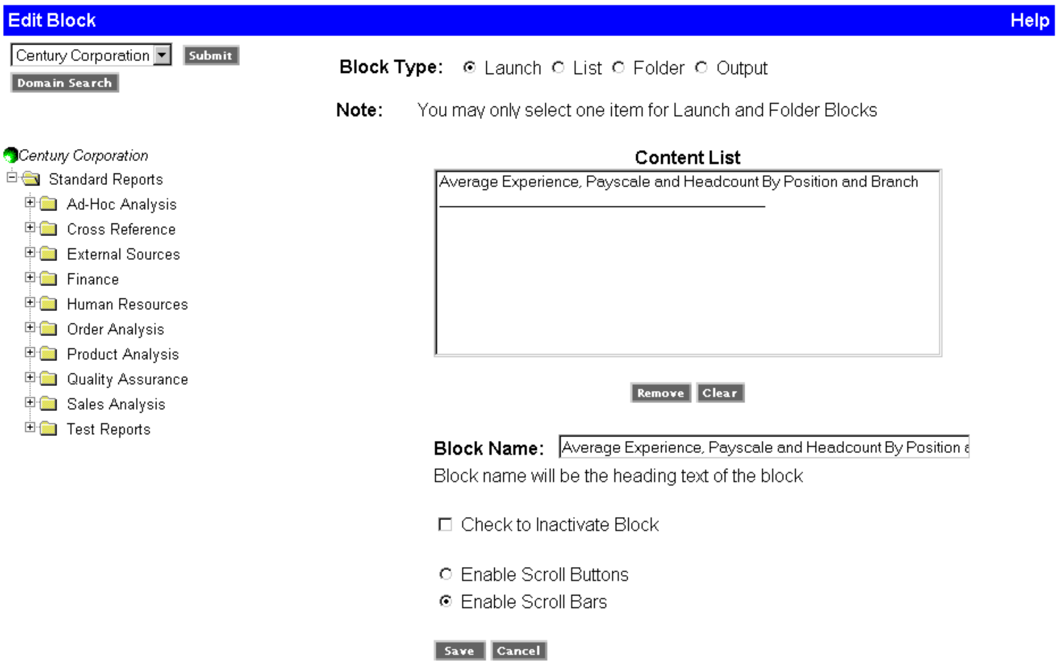
Procedure How to Remove a Content Block

1. From the Content window, select the content page where the content block is located.
2. Click the check box(es) next to the block(s) you wish to remove.
3. Click *Remove Block*. An alert window displays to confirm the removal of the block.
4. Click *OK* to confirm the removal.

Editing a Content Block

From the Edit window, you can edit existing content blocks. When you select the edit option, the name of the content block and its attributes display in the Edit window. You can edit the block type, block contents, block name, and scrolling options.

You can also deactivate a content block. This is useful when you want to temporarily remove a content block from a Dashboard view. When a content block is deactivated, it is designated in the Content window with a red icon (as opposed to green, which designates an active content block).



Procedure How to Change the Content Block Type

Note: When you change the content block type, all of the items in the block will be removed and the block name will clear.

1. From the Content window, select the content page where the content block is located.
2. Click the check box next to the block you wish to edit.
3. Click *Edit Block*. The Edit Block window opens.

4. Select the block type radio button.

   All of the items in the block will be removed and the block name will clear.

5. Click *Save*.

Procedure How to Add an Item to a List Block

1. From the Content window, select the content page where the content block is located.
2. Click the check box next to the list block you wish to edit.
3. Click *Edit Block*. The Edit Block window opens.
4. Select a domain from the drop-down list. You can also add items to a content block using Domain Search. For details see *How to Add Items to a Content Block Using Domain Search* on page 11-6.
5. Click *Submit*.
6. Navigate to the item you wish to add in the Domain Tree by clicking the plus sign (+) located next to the folder icon.
7. Click an item to add it to the Content List.
8. Click *Save*.

Procedure How to Remove an Item From a List Block

1. From the Content window, select the content page where the List block is located.
2. Click the check box next to the list block you wish to edit.
3. Click *Edit Block*. The Edit Block window opens.
4. In the Content List highlight the item you wish to remove.
5. Click *Remove*.
6. Click *Save*.

Procedure How to Change the Contents of a Launch Block

1. From the Content window, select the content page where the launch block is located.
2. Click the check box next to the launch block you wish to edit.
3. Click *Edit Block*. The Edit Block window opens.
4. Highlight the item in the Content List and click *Remove*.

5. Select a domain from the drop-down list and click *Submit*. You can also add items to a content block using Domain Search. For details, see *How to Add Items to a Content Block Using Domain Search* on page 11-6.
6. Navigate to the item you wish to add in the Domain Tree by clicking the plus sign (+) located next to the folder icon.
7. Click an item to add it to the Content List.
8. Click *Save*.

Procedure How to Change the Contents of a Folder Block

1. From the Content window, select the content page where the folder block is located.
2. Click the check box next to the folder block you wish to edit.
3. Click *Edit Block*. The Edit Block window opens.
4. Highlight the item in the Content List and click *Remove*.
5. Select a domain from the drop-down list and click *Submit*. You can also add items to a content block using Domain Search. For details, see *How to Add Items to a Content Block Using Domain Search* on page 11-6.
6. Navigate to the folder you wish to add in the Domain Tree.
7. Click a folder to add it to the Content List.
8. Click *Save*.

Procedure How to Change the Name of a Content Block

1. From the Content window, select the content page where the content block is located.
2. Click the check box next to the block you wish to edit.
3. Click *Edit Block*. The Edit Block window opens.
4. In the Block name text box, enter the new name for the block.
5. Click *Save*.

Procedure How to Temporarily Remove a Content Block

1. From the Content window, select the content page where the content block is located.
2. Click the check box next to the block you wish to edit.
3. Click *Edit Block*. The Edit Block window opens.
4. Select the *Check to Inactivate Block* box.
5. Click *Save*.

Selecting Scrolling Options

You can select either scroll buttons or scroll bars for launch blocks, list blocks, and folder blocks. Scroll buttons cannot be selected for output blocks and launch blocks that launch Web pages. Output blocks will automatically contain scroll bars when necessary.

When scroll *buttons* are enabled, up, down, left and right arrows display in the control bar allowing you to navigate the content block. Up and down arrows display for all content block types. Left and right arrows only display for launch blocks. In folder blocks and list blocks information automatically wraps, therefore eliminating the need to scroll to the left or right.

When scroll *bars* are enabled, scroll bars display when content exists that cannot be viewed within the displayed window. When this option is selected, scroll buttons do not display in the control bar.

Procedure How to Select Scrolling Options for Content Blocks from the View Builder

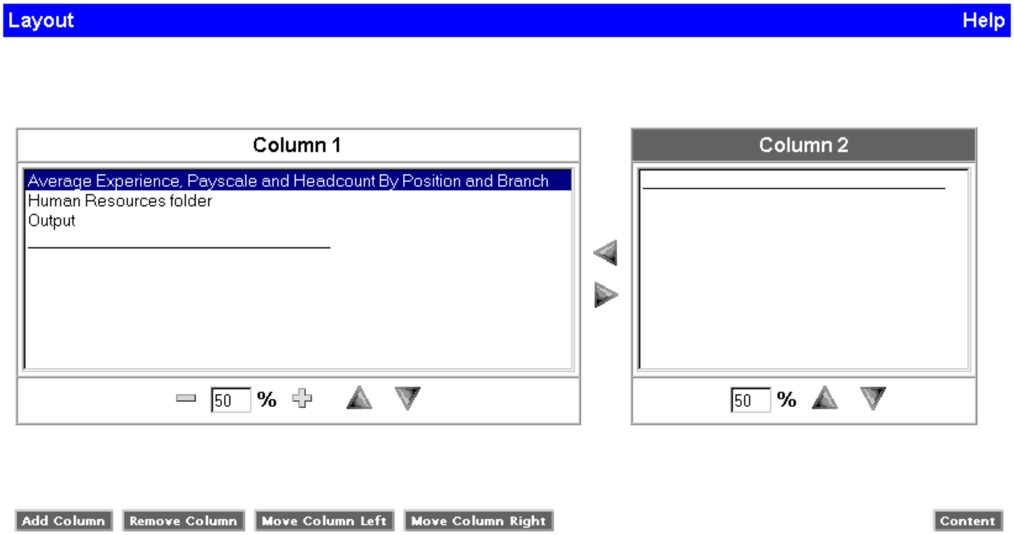
1. From the Content window, select the content block you wish to add scrolling options for and click *Edit Block*. The Edit Block window opens.
2. Select the *Enable Scroll Buttons* or *Enable Scroll Bars* radio button.
3. Click *Save*.

Selecting Content Layout

By default, content blocks are displayed in one column in Dashboard. From the Layout window, you can change the default view. You can select a different layout for each content page.

When selecting the layout for your content page, you can:

- Add columns.
- Remove columns.
- Specify column width.
- Rearrange column order.



Procedure How to Add a Column

1. From the Content window, select a content page and then click *Page Layout*.
2. Click *Add Column*. To move:
   - Items from one column to another, highlight the item and use the left and right arrows between the columns.
   - The position of a column, select the column and click *Move Column Left* or *Move Column Right*.
3. Click *Content* to return to the Content window.

Procedure How to Adjust Column Width

1. From the Content window, select a content page and click *Page Layout*.
2. Click the + or - signs in the column to adjust column width.

   Note that you cannot adjust the width for the last column. Since column width total must equal 100%, the last column will always be the remainder of all the other columns. For example, if you have 3 columns and column 1 is 50% and column 2 is 25%, column 3 will automatically be 25%.
3. Click Content to return to the Content window.

Exiting the Content Window

You exit the Content window by clicking Public Views or Group Views. Your changes are saved and you return to the Public Views or Group Views window.

CHAPTER 12

Managing the Dashboard

Topics:

- Managing Public Views
- Managing Group Views
- Managing Private Views
- Enabling Tracing Options

The following views are available within the WebFOCUS Business Intelligence Dashboard:

- The general public view.
- Custom public views.
- Group views.
- Private views.

Each view has different rights and different levels of security.

The administrator controls what users can access in the general public view, the custom public view, and in group views. This includes the domains they can view and certain functionality such as the Domain Search.

The administrator also controls the look of the Dashboard for all views.

Managing Public Views

Public views allow you to publish information on the Web and allow your users to view reports and other information without having to enter login information. There are two types of public views:

- **General public view** can contain any type of information and is usually intended for a wide variety of audiences.
- **Custom public view** can provide more detailed information that is targeted for a specific group of users. Access to a custom public view is the same as the general public view, with the default user ID and password as the authentication information. Therefore, the public user can view reports and data that are available in the general public view and custom public views.

Custom and public views can be made secure through the addition of Web server security. If you want to increase security on public views so that each public page has access only to the intended information, you can restrict the public pages on the HTML files that display the view. For details, see Chapter 8, *Creating Public and Group Views*.

In addition, since the information in each public view (general or custom) may not be relevant to every public user who connects to Dashboard, you may want to prohibit certain functionality by excluding the display of available domains from the general and custom public views. In other words, you can control the information a public user can view. To manage access so that users only see relevant information you can:

- Allow access to only those domains with public information.
- Eliminate the display of the Domain Tree and Role Tree in the Dashboard.
- Eliminate the domain search.
- Restrict the ability to run reports. If there is a high volume of traffic to a public view (general or custom), you may want to decrease the load on the Web server and the WebFOCUS Reporting Server by restricting users from running reports that directly access data. This is especially useful if a public view contains launch blocks, in which the report runs automatically when the public user opens the Dashboard.

  To prevent public users from running reports, you can select only pre-built reports for the Role Tree, List blocks, Launch blocks, and Folder blocks. If you want public users to view updated reports without having to run them, you can use ReportCaster to generate report output and refresh pre-built reports on a scheduled basis. For details, see the *ReportCaster Development and Administration Manual*.

Managing Group Views

Group views allow you to create a secure Dashboard view for the members of an Managed Reporting repository group. Only members of the group can see the view. It is secure in that the user must enter a valid Managed Reporting user ID and password to access the group view.

In each view, the administrator selects a banner, the colors, composition, and content. Since the administrator selects the content of the group view, it is a way to give access to applications or reports that are very important to the members of the group.

Users will not be able to personalize a group view. This means they cannot customize the look or the content.

When a user logs into Dashboard, they will be able to see the views that have been created for each group they belong to. This list includes a link to "My View", the user's personal view.They will also be able to personalize their own Dashboard view (not the group view).

Managing Private Views

Private views are each user's personalized view of Dashboard. A user can personalize the Dashboard by placing reports from the available domains in the Content area of the Dashboard. Users cannot customize the look of the Dashboard.

A private view is created for users when they connect to the Dashboard with their own Managed Reporting user ID and password. The private view is based on the general public view or custom public view the user logs in from. From here, the user can begin to personalize the content in the private view.

Private views are secure in that a user must enter a valid Managed Reporting user ID and password.

Each user can only access domains that the administrator makes available in the Managed Reporting User Administration tool.

Enabling Tracing Options

By default, the Dashboard tracing option is not turned on. Tracing should only be turned on when requested to do so by an Information Builders representative.

Tracing is only active when the TRACE_LEVEL parameter exists with a valid value. To turn the Dashboard tracing option on, add the TRACE_LEVEL initialization parameter in the servlet engine configuration. For details, see *How to Add the TRACE_LEVEL Parameter for Windows NT/2000* on page 12-4 and *How to Add the TRACE_LEVEL Parameter for UNIX and OS/390* on page 12-4.

All trace files are created under the IBI/WebFOCUS52/worp/log directory. A trace file is created for every session, therefore it is possible to have many trace files generated for one user.

Procedure How to Add the TRACE_LEVEL Parameter for Windows NT/2000

1. Open the ServletExec Administration tool.
2. Under Web Applications, click *Manage*.
3. Under WebFOCUS52 Application Name, click *web.xml*.
4. Under Servlets, click *Manage*.
5. Under Servlet Name, click *WORP_Loader*.
6. Under Initialization Parameters, add the following:
   - **name:** TRACE_LEVEL
   - **value:** FATAL, ERROR, WARN, INFO, or DEBUG. FATAL is for minimum tracing, DEBUG is for maximum tracing, and OFF turns the tracing option off.

   Descriptions are optional.
7. Click *Submit*.
8. From the Configure Web Applications window, click *Reload* for the WebFOCUS52 application.

Procedure How to Add the TRACE_LEVEL Parameter for UNIX and OS/390

1. From the WEB-INF directory, open the web.xml file.
2. Add the following immediately preceding the line </servlet>:

```
<init-param>
    <param-name>TRACE_LEVEL</param-name>
    <param-value>DEBUG</param-value>
</init-param>
```

3. Save and close the file.

Procedure How to Remove or Modify the TRACE_LEVEL Parameter for Windows NT/2000

1. Open the ServletExec Administration tool.
2. Under Web Applications, click *Manage*.
3. Under WebFOCUS52 Application Name, click *web.xml*.
4. Under Servlets, click *Manage*.
5. Under Servlet Name, click *WORP_Loader*.
6. Under Initialization Parameters, delete the TRACE_LEVEL parameter, or change the value to OFF.

7. Click *Submit*.
8. From the Configure Web Applications window, click *Reload* for the WebFOCUS52 application.

Procedure How to Remove or Modify the TRACE_LEVEL Parameter for UNIX and OS/390

1. From the WEB-INF directory, open the web.xml file.
2. Change the value in the TRACE_LEVEL parameter to OFF, as follows:

```
<init-param>
    <param-name>TRACE_LEVEL</param-name>
    <param-value>OFF</param-value>
</init-param>
```

   Alternatively, you can delete the lines that were added for TRACE_LEVEL in the web.xml file.

3. Save and close the file.

Reference Trace File Names

Trace files are named:

```
<username>_<date>_<timestamp>.log
```

where:

username

Is the name that the user logged in with, not the description in Managed Reporting.

date

Is the date in yyyymmdd format. For example, 20010829.

timestamp

Is the time using 24-hour time. For example, 24hhmmss, such as 14015959.

The log file for a user logged in as ADMIN on Aug 29th, 2001 at 2:01:59 PM would be:

```
ADMIN_20010829_140159.log
```

Reference Trace File Contents

Trace files contain the following information:

```
<thread number> <date> <time> <level> <location> <message>
```

where:

thread number

Is the number generated for each new task performed in the servlet `date`

Is the date when the line of trace code is created. The format is MM/DD/YYYY.

`time`

Is the time when the particular trace code has been written to the trace file. The format is hh:mm:ss:nnn.

`level`

Is the TRACE_LEVEL defined in the servlet parameters. Valid entries are FATAL, ERROR, WARN, INFO, DEBUG or OFF.

`location`

Is the internal location called by the Dashboard. The format is *<Java class name>*.*<Java method name>*.

`message`

Is the internal trace text.

CHAPTER 13

Change Management

Topics:

- Understanding the Change Management Process
- Managed Reporting Development Environment
- Understanding Internal Managed Reporting References
- Managed Reporting Change Management Features

Change management is the process of moving application components between WebFOCUS environments. Developers move components between development and testing environments. Systems or production control professionals move components between testing and production environments. There are features in Managed Reporting and methodologies that can be used to facilitate these important tasks.

For more information about configuring multiple WebFOCUS environments, see the Best Practices papers entitled *Enterprise Implementation Considerations* at techsupport.ibi.com/bestpractices.

Understanding the Change Management Process

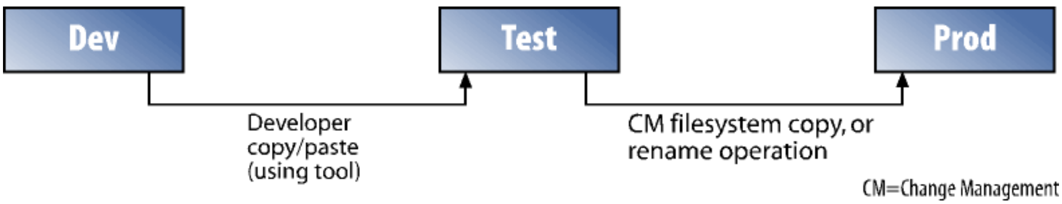
Developing an application is an iterative process. Developers are constantly revising pieces of their application and periodically moving these components to the test environment for feedback. At some point, user feedback must be solicited and the application must be stable. After an application is released for general use, problems must be fixed, tested, and incorporated into the production environment. This is the essence of change management, sometimes also referred to as configuration management or production control.

Companies vary widely in how they approach change management. Some delegate much of the responsibility to developers while others establish separate organizations to maintain a higher degree of control. Typically developers prefer to stay in their development tool environment to perform these duties while change management professionals prefer batch-oriented and API-based methods to move application components between environments. Developers may be required to use a home-grown change management application in order to initiate changes once the application has moved into production. Often times it is a combination of these approaches being used within larger companies.

The examples that follow illustrate two different change management processes that might be found in a company. These sections describe product features and methodologies that can be utilized by companies to meet their change management objectives with Managed Reporting.

Example A Simple Change Management Process

In this example, developers move application files between the development and test environments using their development tool. When the application is finished, a systems person copies the application from test to production using operating system utilities. There may only be a single test environment as shown in the following graphic.:

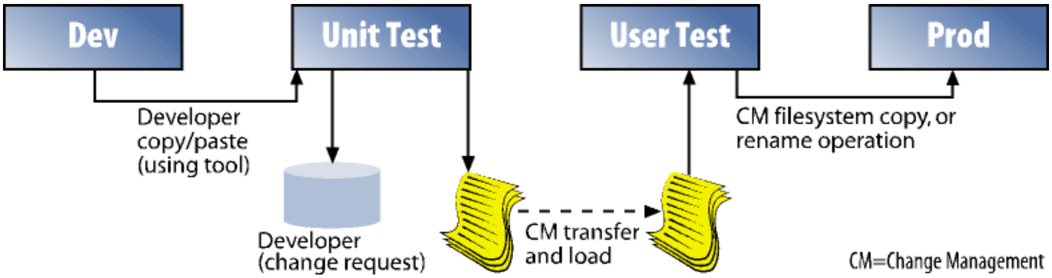


Example A Comprehensive Change Management Process

In this example, four WebFOCUS environments are established to increase the level of control over the process. Developers use their tool to move application files from development to test and sign on to a custom application to initiate the next step of the change process.

A custom application accumulates developer change requests and then extracts the changed files from the integration test environment and inserts them into the quality assurance environment. The custom application logs changes for record keeping purposes.

When the application is deemed ready for release, the change management organization initiates a file system copy of the application to the production environment. Users begin using the application and the change management process shifts into an application maintenance support role.



Managed Reporting Development Environment

When you are developing a Managed Reporting application, you are working with files that are controlled by the WebFOCUS Client and stored in a centralized location called the Managed Reporting Repository. There is no decentralized local developer copy of this Repository or of Managed Reporting files. Regardless of whether the developer is using the Java applet or Developer Studio tools, the process entails retrieving a copy of the file(s), making changes, and saving the files back to the Repository.

This means that all Managed Reporting developers are working in a common Repository simultaneously and moving their application components to a common test environment. The Managed Reporting Domain/Domain Admin concept enables two or more developers to work on different parts of the application simultaneously without affecting each other. However, when two or more developers are working on files in a single Domain, the responsibility is on the developers to coordinate their changes. For example, if two developers are working on the same report file at the same time, the last one saving the file overwrites it.

Understanding Internal Managed Reporting References

Developers and end users see and use Descriptions to navigate their way about the Managed Reporting environment. The Managed Reporting environment itself uses internal references instead to locate and process requests for Managed Reporting resources.

At any time, developers are free to change these Descriptions and users will see them the next time they login to Managed Reporting (or refresh their view). A Description change does not affect how the file is processed since the internal reference remains the same.

The internal references for certain Managed Reporting objects are shown below:

- **Domain.** Visible on the Domain Properties dialog box, for example, untitled/untitled.htm
- **Standard Report.** Visible on the Report Properties dialog box, for example, app/prospect.fex or app/launchpa.htm.
- **Reporting Object.** Visible on the Reporting Object Propeprties dialog box, for example, mrv/salesdat.fex
- **Folders and Sub-Folders.** Visible on the object's Property dialog box, for example, #westernregio.
- **Repository.** This is not visible from within the Java applet tools but can be specified on the signon page to override the default value. Developers using Developer Studio can specify the Repository within the WebFOCUS Environment Properties dialogue. For more information, see the *WebFOCUS Developing Reporting Applications* manual. The variable MR_BASE_DIR specifies the full operating system path to the root of the Managed Reporting Repository (for example, d:\ibi\WebFOCUS52\basedir) and is defaulted in the WebFOCUS script file cgivars.wfs.

When you create a Domain, Report, or Folder with the tools, Managed Reporting generates the internal reference for the object and stores it. The Description you provided is used to create the reference, although spaces and special characters are removed and the reference is truncated to a fixed length. If you create another object with a similar Description, Managed Reporting may decide to randomly generate the reference to ensure that each reference is unique within its namespace.

These references are used within the product from many places. Products and features that use these references include:

- Published Launch pages inside or outside the Repository.
- ReportCaster, to retrieve the report at execution time.
- Drill down links.
- End user My Reports.

When moving files between Managed Reporting Repositories, such as between your development and test environments, it is critical that these references (and the Descriptions) remain the same.

You can avoid problems by performing the following:

- Create the domains in each of your environments in the same order. The internal references will be created the same in each.
- Use the Properties dialog box to check references.
- Pay attention to alert windows when copying files.
- Test your application before moving it into production.

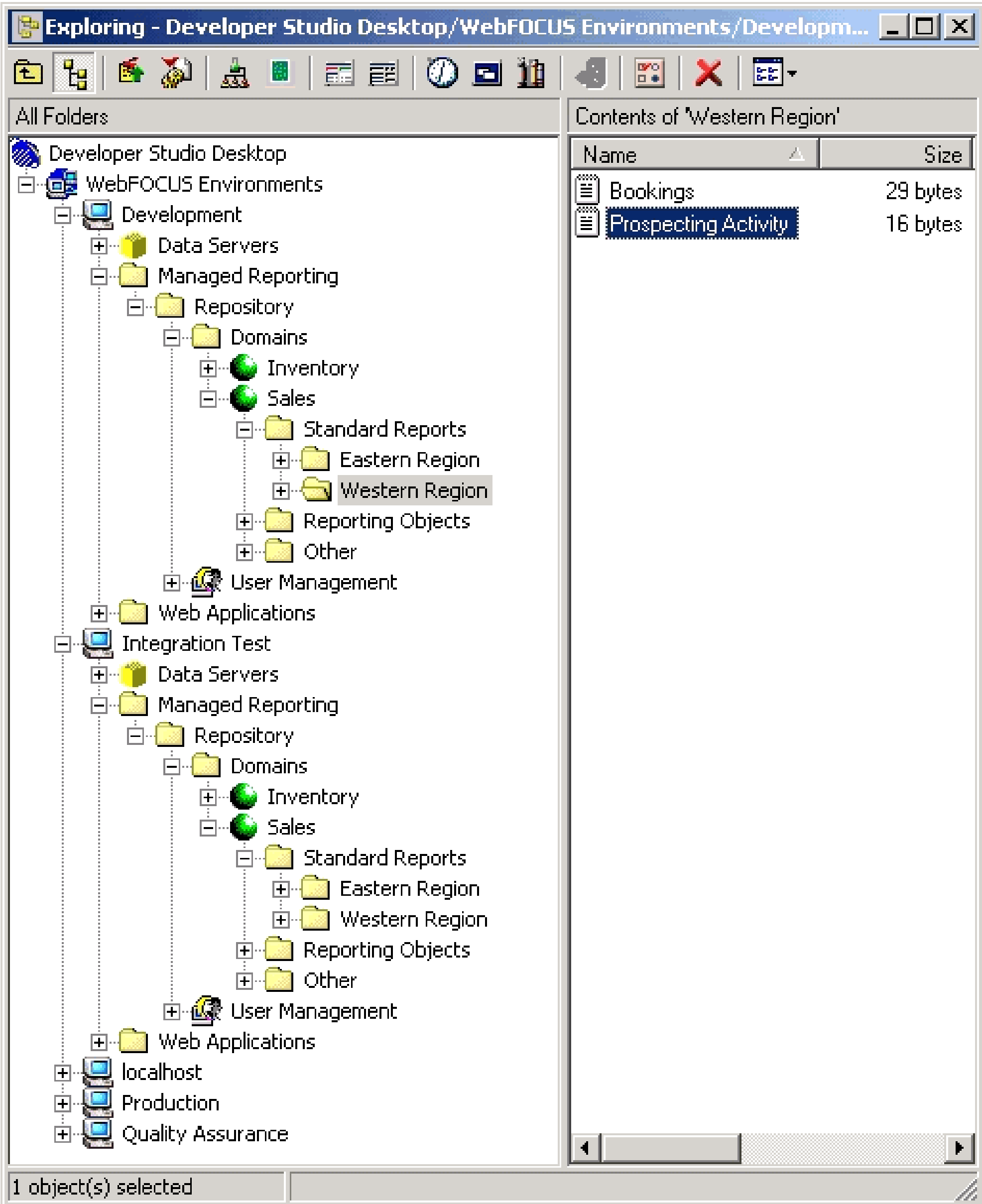
Managed Reporting Change Management Features

The following sections detail features or methodologies that can help organizations achieve their change management objectives with Managed Reporting.

Note: The inter-Repository copy features described below are only supported in the Windows-based Developer Studio product. This is because Developer Studio can connect with two or more Managed Reporting environments simultaneously, while the Java applet tools cannot.

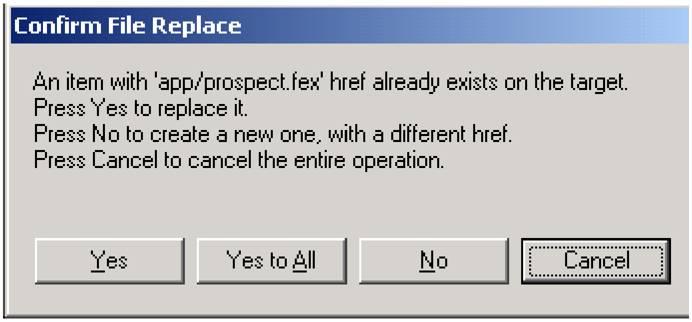
Copying Files Between Environments Using Developer Studio

From the Explorer window, you can drag and drop (or copy/paste) a modified procedure called Prospecting Report from your Development environment to the Western Region folder of the Integration Test environment.



A status window shows the progress of the copy operation. Note the internal folder reference, #westernregio, of the procedure being copied.

If the procedure already exists in the destination (meaning that this procedure's internal reference is already being used), another alert window appears:

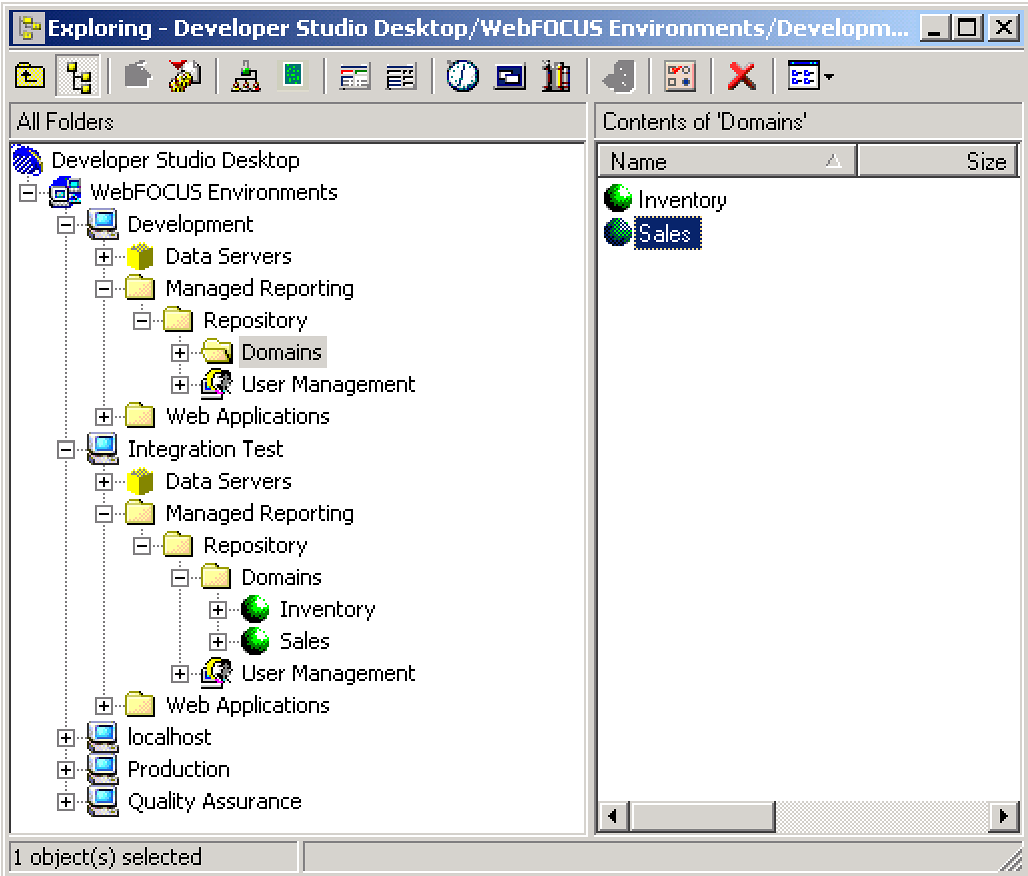


If you are sure that the procedure you are copying is an update for the one in the target, click Yes (or Yes to All) and it will be updated. If you click No, your file will be copied to the target Repository and a new internal reference will be generated for it. In this case, it is your responsibility to resolve problems with other products and features that may be relying on this reference, which you have agreed to change. See *Understanding Internal Managed Reporting References* on page 13-4.

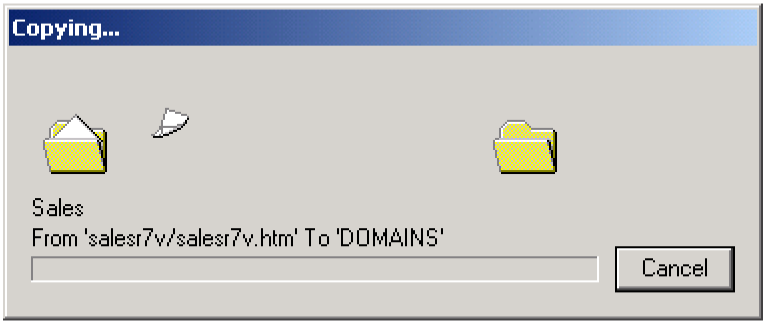
If you are at all unsure about what to do, click Cancel and contact your administrator.

Copying a Domain Between Environments Using Developer Studio

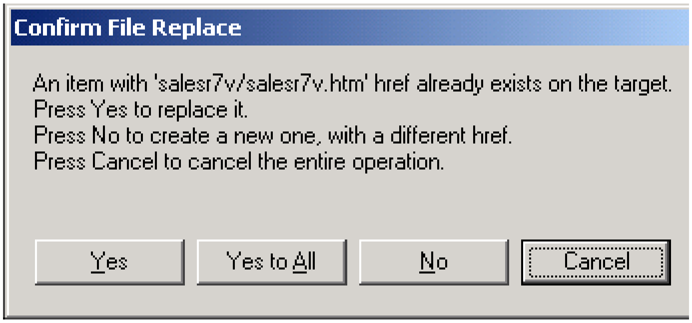
From the Explorer window, you can drag and drop (or copy/paste) the contents of an entire Domain called Sales from your Development environment to the Domains folder of the Integration Test environment.



A status window shows the progress of the copy operation. Note the internal reference salesr7v/sales7rv.htm of the Domain being copied.



If the Domain already exists in the destination (meaning that this Domain's internal reference is already being used), another alert window appears:



If you are sure that the Domain you are copying is a complete replacement for the one in the target, click Yes and it will be updated. If you click No, your Domain will be copied to the target Repository and a new internal reference will be generated for it. In this case, it is your responsibility to resolve problems with other products and features that may be relying on this reference, which you have agreed to change. See *Understanding Internal Managed Reporting References* on page 13-4 for more information.

If you are at all unsure about what to do, click Cancel and contact your administrator.

Programmatically Moving Resources Between Environments

IBI recognizes the requirement that there be a programmatic way to extract Standard Reports and Reporting Objects from one Managed Reporting Repository and insert them into another. Taking the human element out of the process improves reliability and security while increasing auditability. Having this capability is key to the change management process at many larger companies.

There is a new Java API underlying the Version 5 Release 2 Managed Reporting environment that will be formally released to customers in the future. Many of the Managed Reporting features you see in this release are based on this API, including the Managed Reporting Extract Utility (WebFOCUS52/utilities/mrextract.bat) and the Managed Reporting API Sample Page (http://machine/ibi_html/samples/mrapi.htm). You can use these API-based features to learn more about the API. If you are interested in programmatically moving resources between Managed Reporting environments, please contact IBI Customer Support so that you can receive advance notification of information about the API.

CHAPTER 14

Managed Reporting Extract Utility

Topics:

- Managed Reporting Extract Utility
- Running the Managed Reporting Extract Utility
- Managed Reporting Extract Utility Output Files
- Master Files and Sample Procedure
- Reporting From Extract Files
- Property Flags

The Managed Reporting Extract utility allows you to extract data from your Managed Reporting Repository in order to generate reports about users, groups, domains, and domain content.

Managed Reporting Extract Utility

You can extract and process the following types of information from the Managed Reporting Repository using the Managed Reporting Extract utility:

- User information and the groups to which they belong.
- Group information and the domains to which they are associated.
- Domain information.
- Domain content information.

  Is the drive where you installed WebFOCUS.

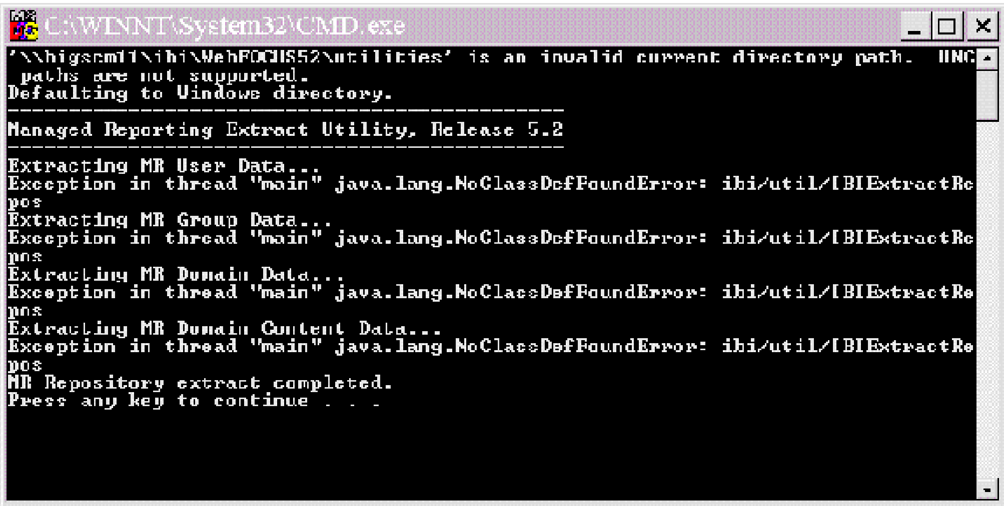
Running the Managed Reporting Extract Utility

The Managed Reporting Extract utility is run on the machine where WebFOCUS is installed. You can use Telnet or some other form of remote access to execute the utility when it is not possible to physically be at the WebFOCUS machine. For convenience, a batch file is provided to call the utility with standard arguments.

Procedure How to Run the Managed Reporting Extract Utility

1. Navigate to the WebFOCUS52/utilities directory.
2. Execute the mrextract.bat file (Windows NT/2000 systems) or mrextract file (Unix systems).

   A series of messages will appear on the screen:



Syntax How to Call IBIExtractRepos Programmatically

The underlying program that extracts information from the Managed Reporting Repository is written in Java and is contained in the archive WebFOCUS52/ibi_html/javaassist/IBIExtractRepos.jar.

You call the program with the following arguments:

```
java -cp archivepath ibi.util.IBIExtractRepos userid configpath option
[option] > outputfile
```

where:

archivepath

Is the full or relative path to the IBIExtractRepos.jar file (for example, d:\ibi\WebFOCSU52\ibi_html\javaassist\IBIExtractRepos.jar).

userid

Is the Managed Reporting user ID to use in this command.

configpath

Is the full or relative path to the directory containing ibiweb.cfg (for example, d:\ibi\client52\wfc\web\cgi).

option

Program options include [-users] [-groups] [-domains] [-domaincontent].

>

Redirects the utility's output to a file.

outputfile

The name of the output file.

The program requires an input parameter of user ID. The user ID determines which domains or domain content is returned when the –domains or –domaincontent option is passed. For example, if the user ID has Managed Reporting Administrator privileges, then all domains are returned. If the user ID is Public, then only those domains associated with the group(s) that the Public user belongs to will be returned. When using the –users or –groups option, a value must be passed for user ID. This value is not used for any filtering purpose, however, in this case, you can supply the built-in Public user.

You can tailor the extract utility for your own purposes. The Java source code for this utility (IBIExtractRepos.class) is provided in the WebFOCUS52/utilities directory.

Managed Reporting Extract Utility Output Files

Output files extracted by the Managed Reporting Extract utility contain comma-delimited information.

Example **Extracting User Information**

When you generate an output file for user information, the data is written in the following format:

"*user_htm*","*mre_id*","*user_properties*","*user_description*","*group_href*"

One line is generated in the output file for each group to which the user belongs. For example,

```
"wfuser.htm","wfuser","active,htmluser,","user descript.","#default"
"abcuser2.htm","abcuser2","active","ABC User 2 Desc","#abccommongro"
"abcuser2.htm","abcuser2","active","ABC User 2 Desc","#abcgroup2"
"abcuser1.htm","abcuser1","active","ABC User 1 Desc","#abccommongro"
"abcuser1.htm","abcuser1","active","ABC User 1 Desc","#abcgroup1"
"verylong.htm","verylongusernameindeed","active","jim
smith","#abccommongro"
"admin.htm","admin","admin,robot,robot,shared,sync","default
user","#default"
"phil.htm","phil","active,shared,robot","phil","#default"
"phil.htm","phil","active,shared,robot","phil","#verylonggrou"
"javauser.htm","javauser","active,robot,shared","javauser","#default"
"javauser.htm","javauser","active,robot,shared","javauser","#verylonggrou"
```

Example **Extracting Group Information**

When you generate an output file for group information, the data is written in the following format:

"*group_href*","*group_description*","*domain_htm*"

For example,

```
"#verylonggrou","verylonggroup name indeed","untitled/untitled.htm"
"#verylonggrou","verylonggroup name indeed","a77q8wik/a77q8wik.htm"
"#verylonggrou","verylonggroup name indeed","jimv0o1e/jimv0o1e.htm"
"#abccommongro","ABC Common Group","abccommo/abccommo.htm"
"#default","default group","untitled/untitled.htm"
"#abcgroup2","ABC Group 2","a77q8wik/a77q8wik.htm"
"#abcgroup2","ABC Group 2","db5cwlin/db5cwlin.htm"
"#abcgroup1","ABC Group 1","abcdomai/abcdomai.htm"
"#mregroup2","MRE Group 2","samplere/samplere.htm"
"#mregroup1","MRE Group 1","salesrep/salesrep.htm"
```

Example Extracting Domain Information

When you generate an output file for domains information, the data is written in the following format:

```
"domain_htm","domain_properties","domain_description"
```

For example,

```
"jimssumm/jimssumm.htm","disabled","Jim's Summit Domain"
"untitled/untitled.htm","none","zzManagement Reporting (Development
Area)"
"db5cwlin/db5cwlin.htm","none","ABC Domain 2"
"samplere/samplere.htm","none","zzSales Reporting (Development Area)"
"philipse/philipse.htm","none","Company Reporting"
"abccommo/abccommo.htm","none","ABC Common Domain"
"a77q8wik/a77q8wik.htm","none","ABC Domain 2 (test)"
"salesrep/salesrep.htm","none","Sales Reporting"
"jimv0o1e/jimv0o1e.htm","","jim"
"abcdomai/abcdomai.htm","none","ABC Domain 1"
```

Example Extracting Domain Content Information

When you generate an output file for domain content information, the data is written in the following format

```
"domain_htm","record_type","record_subtype","item_href","item_description",
"item_flags","item_folder"
```

Note:

- The *record_type* indicates the type of item found. Possible values are: HELP, PROFILE, OTHER (Others Files), STDRPT (Standard Report), or RPTOBJ (Reporting Object).
- The *record_subtype* indicates the type of Standard Report or Reporting Object item found. Possible values are: ITEM or FOLDER. If the type is not ITEM or FOLDER, *record_subtype* is empty.
- The *item_href* is the item's reference. This is prefixed with the following characters depending on its type:
  - `#foldername` when the item is a folder.
  - `app/standardreportname.fex` when the item is a Standard Report.
  - `mrv/reportingobjectname.fex` when the item is a Reporting Object.

For example,

```
"domain01/domain01.htm","HELP","","app/help.htm","Help","",""
"domain01/domain01.htm","STDRPT","FOLDER","#dailyreports","Daily
Reports","belongsto=#salesreports","#salesreports"
"domain01/domain01.htm","STDRPT","ITEM","app/salestra.fex","Sales
Transactions","node=UNIXSRV8E,appname=salesdtl","#dailyreports"
"domain01/domain01.htm","STDRPT","FOLDER","#salesreports","Sales
Reports","none",""
"domain01/domain01.htm","STDRPT","FOLDER","#weeklyreport","Weekly
Reports","belongsto=#salesreports","#salesreports"
"domain01/domain01.htm","STDRPT","ITEM","app/salesana.fex","Sales
Analysis","runasolap","#weeklyreport"
"domain01/domain01.htm","STDRPT","ITEM","app/salesbyb.fex","Sales by
Branch","none","#weeklyreport"
"domain01/domain01.htm","RPTOBJ","FOLDER","#salesdatau5t","Sales
Data","none",""
"domain01/domain01.htm","RPTOBJ","ITEM","mrv/
customer.fex","Customers","suffix","#salesdatau5t"
"domain02/domain02.htm","HELP","","app/help.htm","Help","",""
"domain02/domain02.htm","STDRPT","FOLDER","#inventoryrep","Inventory
Reports","none",""
```

Master Files and Sample Procedure

The following Master Files (.MAS) and sample procedure (.FEX) are provided for your reference:

- IBIMRUSR.MAS
- IBIMRGRP.MAS
- IBIMRDOM.MAS
- IBIMRDMC.MAS
- MRSAMP01.FEX
- MRSAMP02.FEX
- On Windows NT-based systems, these files are found in the *drive*:\ibi\apps\ibisamp directory. On UNIX-based systems, these files are found in the /ibi/apps/ibisamp directory. The IBISAMP application is now configured as the server's default search path.
- On OS/390-based systems, the Master Files are in the library allocated to EDAMFD and the FOCEXEC files are in the library allocated to EDARPC.

Reference IBIMRUSR.MAS

```
$-------------------------------------------------------------------------
$  IBIMRUSR.MAS
$-------------------------------------------------------------------------
FILE=IBIMRUSR,  SUFFIX=COM
SEGNAME=IBIMRUSR, SEGTYPE=S0
FIELD=USER_HTM,   ALIAS=E01,  ACUTAL=A12,  USAGE=A12,  $
FIELD=USER_ID,    ALIAS=E02,  ACUTAL=A48,  USAGE=A48,  $
FIELD=USER_PROP,  ALIAS=E03,  ACUTAL=A256, USAGE=A256, $
FIELD=USER_DESC,  ALIAS=E04,  ACUTAL=A256, USAGE=A256, $
FIELD=GROUP_HREF, ALIAS=E05,   ACUTAL=A13,  USAGE=A13,  $
```

Reference IBIMRGRP.MAS

```
$-------------------------------------------------------------------------
$  IBIMRGRP.MAS
$-------------------------------------------------------------------------
FILE=IBIMRGRP,  SUFFIX=COM
SEGNAME=IBIMRGRP, SEGTYPE=S0
FIELD=GROUP_HREF,  ALIAS=E01,  ACUTAL=A13,  USAGE=A13,  $
FIELD=GROUP_DESC,  ALIAS=E02,  ACUTAL=A256, USAGE=A256, $
FIELD=DOMAIN_HTM,  ALIAS=E03,   ACUTAL=A21,  USAGE=A21,  $
```

Reference IBIMRDOM.MAS

```
$-------------------------------------------------------------------------
$  IBIMRDOM.MAS
$-------------------------------------------------------------------------
FILE=IBIMRDOM,  SUFFIX=COM
SEGNAME=IBIMRDOM, SEGTYPE=S0
FIELD=DOMAIN_HTM,   ALIAS=E01,  ACUTAL=A21,  USAGE=A21,  $
FIELD=DOMAIN_PROP,  ALIAS=E02,  ACUTAL=A40,  USAGE=A40,  $
FIELD=DOMAIN_DESC,  ALIAS=E03,   ACUTAL=A256, USAGE=A256, $
```

Reference IBIMRDMC.MAS

```
$-----------------------------------------------------------------
$ IBIMRDMC.MAS
$-----------------------------------------------------------------
FILE=IBIMRDMC, SUFFIX=COM, REMARKS='MR Domain Content Data',
SEGNAME=IBIMRDMC, SEGTYPE=S0
FIELD=DOMAIN_HTM, ALIAS=E01, ACTUAL=A21, USAGE=A21,
TITLE='Domain,Reference',
DESC='Joins many to one with DOMAIN_HTM in domains extract.',$
FIELD=REC1, ALIAS=E02, ACTUAL=A6, USAGE=A6, TITLE='Record,Type',
DESC='Values: HELP, OTHER, STDRPT, RPTOBJ, or PROFILE', $
FIELD=REC2, ALIAS=E03, ACTUAL=A6, USAGE=A6, TITLE='Record,Sub-type',
DESC='Values: ITEM, FOLDER, or null', $
FIELD=ITEM_HREF, ALIAS=E04, ACTUAL=A16, USAGE=A16,
TITLE='Item,Reference',
DESC='Item reference', $
FIELD=ITEM_DESC, ALIAS=E05, ACTUAL=A256, USAGE=A256, TITLE='Item Name',
DESC='Item description.',$
FIELD=ITEM_PROP, ALIAS=E06, ACTUAL=A256, USAGE=A256,
TITLE='Item,Properties',
DESC='The properties for this item.',$
FIELD=ITEM_FOLDER, ALIAS=E07, ACTUAL=A13, USAGE=A13, TITLE='Item Folder',
DESC='Folder href this item belongs in.',$
```

Example: Using the MRSAMP01 Procedure to Relate Users to Domains

```
SET PCOMMA=ON
-* NT/UNIX: edit FILEDEFs below as appropriate or put in EDASPROF.PRF
instead
FILEDEF IBIMRUSR DISK d:\ibi\WebFOCUS436\utilities\IBIMRUSR.TXT
FILEDEF IBIMRGRP DISK d:\ibi\WebFOCUS436\utilities\IBIMRGRP.TXT
FILEDEF IBIMRDOM DISK d:\ibi\WebFOCUS436\utilities\IBIMRDOM.TXT
-* OS/390: remove FILEDEFs, uncomment and edit DYNAMs below as
appropriate
-* DYNAM ALLOC FILE IBIMRUSR DSN 'hlq.IBIMRUSR.TXT' SHR REU
-* DYNAM ALLOC FILE IBIMRGRP DSN 'hlq.IBIMRGRP.TXT' SHR REU
-* DYNAM ALLOC FILE IBIMRDOM DSN 'hlq.IBIMRDOM.TXT' SHR REU
-RUN
SET ALL=ON
TABLE FILE IBIMRUSR
PRINT
ON TABLE HOLD AS USERINFO FORMAT FOCUS INDEX GROUP_HREF
END
-RUN
TABLE FILE IBIMRDOM
PRINT *
ON TABLE HOLD AS DOMINFO FORMAT FOCUS INDEX DOMAIN_HTM
END
-RUN
TABLE FILE IBIMRGRP
PRINT *
ON TABLE HOLD AS GROUP FORMAT FOCUS INDEX GROUP_HREF
END
-RUN
JOIN GROUP_HREF IN USERINFO TO ALL GROUP_HREF IN GROUP AS J1
JOIN DOMAIN_HTM IN USERINFO TO DOMAIN_HTM IN DOMINFO AS J2
-RUN
TABLE FILE USERINFO
PRINT
DOMAIN_HTM
BY USER_ID
BY USER_DESC
BY GROUP_DESC
BY DOMAIN_DESC
END
```

Note: The SET PCOMMA=ON command is required to report from these files. It can be set in the procedure (as it is in the sample report) or in the WebFOCUS Reporting Server's profile.

Example Using the MRSAMP02 Procedure to Relate Users to Domains

```
* -------------------------------------------------------------

-* MRSAMP02.FEX

-* For use with MR Extract utility. See MR administrator documentation.

-* -------------------------------------------------------------

SET PCOMMA=ON
-* NT/UNIX: edit FILEDEFs below as appropriate or put in EDASPROF.PRF
FILEDEF IBIMRDOM DISK e:\ibi\WebFOCUS52\utilities\IBIMRDOM.TXT
FILEDEF IBIMRDMC DISK e:\ibi\WebFOCUS52\utilities\IBIMRDMC.TXT
-* OS/390:remove FILEDEFs,uncomment and edit DYNAMs below as appropriate
-* DYNAM ALLOC FILE IBIMRDOM DSN 'hlq.IBIMRDOM.TXT' SHR REU
-* DYNAM ALLOC FILE IBIMRDMC DSN 'hlq.IBIMRDMC.TXT' SHR REU
-RUN
SET ALL=ON
TABLE FILE IBIMRDOM
PRINT *
ON TABLE HOLD AS DOMINFO FORMAT FOCUS INDEX DOMAIN_HTM
END
-RUN
TABLE FILE IBIMRDMC
PRINT *
ON TABLE HOLD AS CONTENT FORMAT FOCUS INDEX DOMAIN_HTM
END
-RUN
JOIN DOMAIN_HTM IN DOMINFO TO ALL DOMAIN_HTM IN CONTENT AS J1
-RUN
TABLE FILE DOMINFO
PRINT
ITEM_HREF ITEM_FOLDER ITEM_PROP
BY DOMAIN_DESC
BY REC1
BY REC2
BY ITEM_DESC
END
```

Reporting From Extract Files

You can use WebFOCUS to report from the Managed Reporting extract files (for example, ibimrusr.txt, ibimrgrp.txt, ibimrdom.txt), provided that:

- The extract files reside on the WebFOCUS Reporting Server.
- File allocations (FILEDEF or DYNAM ALLOC) are either:
  - Specified within the procedure.
  - Specified within a WebFOCUS Reporting Server profile.
- You set PCOMMA=ON in your WebFOCUS request since the extract data is comma-delimited with double-quotation marks around each value.

Sending the Data Files

If you are running the WebFOCUS Client and WebFOCUS Reporting Server on different machines, you must FTP the extract files to the WebFOCUS Reporting Server machine. Perform this in ASCII mode using the FTP utility of your choice.

Note: If you are sending the files to an OS/390-based system, your system administrator may have configured the FTP server to truncate incoming data at a fixed width, such as 128 characters. Your IBIMRUSR.TXT file may exceed 128 characters per line. During FTP, take note of the command log to see if the data was truncated. If this is the case, issue the following command at the FTP prompt:

```
QUOTE SITE LRECL=nnn
```

where:

nnn

Is the number of characters you want to set for the maximum line width.

Reissue the FTP PUT command and verify that the data was not truncated.

Allocating the Extract Files to the WebFOCUS Reporting Server

Depending on the platform your WebFOCUS Reporting Server is running on, the command syntax is different. However, in all cases you may place the commands individually within each report procedure or globally in a WebFOCUS Reporting Server profile.

Syntax How to Allocate Extract Files on Windows NT-Based Systems

```
FILEDEF IBIMRUSR DISK drive:\path\IBIMRUSR.TXT
FILEDEF IBIMRGRP DISK drive:\path\IBIMRGRP.TXT
FILEDEF IBIMRDOM DISK drive:\path\IBIMRDOM.TXT
FILEDEF IBIMRDMC DISK drive:\path\IBIMRDMC.TXT
```

where:

drive:\path

Is the disk location of the files.

Syntax How to Allocate Extract Files on UNIX-Based Systems

```
FILEDEF IBIMRUSR DISK /path/IBIMRUSR.TXT
FILEDEF IBIMRGRP DISK /path/IBIMRGRP.TXT
FILEDEF IBIMRDOM DISK /path/IBIMRDOM.TXT
FILEDEF IBIMRDMC DISK /path/IBIMRDMC.TXT
```

where:

path

Is the disk location of the files.

Syntax How to Allocate Extract Files on OS/390-Based Systems

```
DYNAM ALLOC FILE IBIMRUSR DSN 'hlq.IBIMRUSR.TXT' SHR REU
DYNAM ALLOC FILE IBIMRGRP DSN 'hlq.IBIMRGRP.TXT' SHR REU
DYNAM ALLOC FILE IBIMRDOM DSN 'hlq.IBIMRDOM.TXT' SHR REU
DYNAM ALLOC FILE IBIMRDMC DSN 'hlq.IBIMRDMC.TXT' SHR REU
```

where:

hlq

Is the high-level qualifier for the extract files.

Syntax How to Allocate Extract Files on OpenVMS and AS/400-Based Systems

```
filedef ibimrusr disk disk$pm:[ibimrusr.txt]
filedef ibimrgrp disk disk$pm:[ibimrgrp.txt]
filedef ibimrdom disk disk$pm:[ibimrdom.txt]
filedef ibimrdmc disk disk$pm:[ibimrdmc.txt]
```

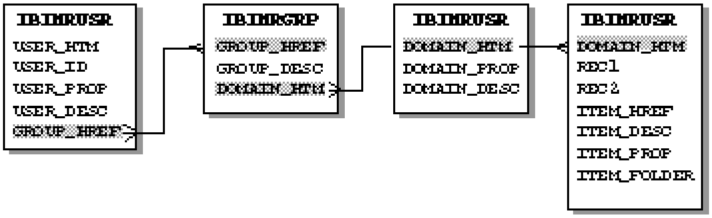
where:

disk$pm

Is the disk location of the files.

Output File Relationships

The following diagram illustrates the relationships between the output files:



A user will appear in the IBIMRUSR data multiple times if they belong to multiple groups. Similarly, a group will appear in the IBIMRGRP data multiple times if it contains multiple domains. A domain will only appear once in the IBIMRDOM data. A domain will always appear more than once in the IBIMRDMC data because each item record is qualified with its domain.

Property Flags

The WebFOCUS Client writes property flags to the user.htm and mrrepos.htm, and *domain*.htm files to control the behavior of Managed Reporting. Knowledge of these flags can help administrators to better understand reports written from the extract files.

Reference **User.htm Flags**

The following table describes the flags that may be encountered in the USER_PROP field in the IBIMRUSR.MAS Master File:

Flag	Description
active	Indicates the user account is enabled.
admin	Indicates the user has Managed Reporting Administrator privileges.
auser	Indicates the Analytic User can save reports and create My Reports.
dadomains=untitled%20salesdom	Indicates this Domain Admin is restricted to administering only the default domain, which has the internal reference “untitled,” and the Sales Domain. The characters %20 delimit the domains when there is more than one domain.

Flag	Description
dataserver=false	Indicates that a Domain Admin does not have access to the Data Server feature.
domadmin	Indicates the user is a Domain Admin.
email=address	Used with ReportCaster library.
emr	Indicates the Windows version user has the Financial Modeling Language (FML) feature enabled.
inactive	Indicates the user account is disabled.
library	User can use ReportCaster Library.
rcadmin	ReportCaster Administrator.
robot	Indicates the user has scheduling privileges.
runonly	Deprecated. Indicates the 4.3.x Java user cannot save reports.
shared	Indicates the user can share reports.
sync	Indicates the user has PDA Sync privileges.
user	Basedir in Managed Reporting. Cannot use tools; can only run reports.

Note: The user flags are not order-dependent. They display based upon the order that they were added from within User Administration.

Reference Mrrepos.htm Flags

The following table describes the flags that may be encountered in the DOMAIN_PROP field in the IBIMRDOM.MAS Master File:

Flag	Description
'' or 'none'	Indicates the domain is active.
disabled	Indicates the domain was deleted.

Reference Domainname.htm Flags

Each Domain has its own control file, which maintains the metadata for its resources.

Flag	Description
appname=application_path	Application path. Series of one or more application names , separated by encoded spaces. For example, `appname=financials%20inventory`
belongsto=#parentfoldername	Parent of subfolder.
ddmap	Request with knowledge mapping.
dragdrill	Run with drag and drill.
filter	Filter is present in request.
hidden	Report is hidden from view.
launch	Published launch file.
node=servernodename	WebFOCUS Reporting Server.
none	No flags are set.
olapreport	A saved olap report.
ptmfex=applicationname/fexname.fex	Link to Two-Way fex.
robot	Indicates the user has scheduling privileges.
runasolap	Olap enables a report.
runonly	Deprecated. Indicates the 4.3.x Java user cannot save reports.
shared	Indicates the user can share reports.
showasreport	Lets the Reporting Object appear as a Standard report.
showonlyreport	Show Reporting Object only as a report.
skipamper	Do not prompt for parameter.
splithorizontal	Used with a TABLE and GRAPH combination to tell cgi to split the frame.

Flag	Description
suffix	Reporting Object contains a suffix.
sync	Indicates the user has PDA Sync privileges.
tellme	Request is for Two-Way Email.

CHAPTER 15

PDA Sync Administration

Topics:

- Setting Up a Standard Report for Sync
- Creating a Channel From the Managed Reporting Repository
- Setting Up a Managed Reporting User for PDA Sync
- Additional AvantGo Installation Files for PDA Sync
- Subscribing to a Channel

Palm OS™ and Pocket PC mobile users can receive WebFOCUS Managed Reporting-based Standard Reports via the PDA Sync report property. Once this property is selected, Managed Reporting users who have been granted PDA Sync access can sync with WebFOCUS to receive selected Standard Reports on their mobile devices.

The Administrator functions necessary for automating this process include setting up Standard Reports and users for sync access, and creating report channels from the Managed Reporting Repository.

Setting Up a Standard Report for Sync

As the Managed Reporting Administrator, you can enable Managed Reporting-based Standard Reports for AvantGo via a publish and subscribe approach. AvantGo supports HTML reports, text reports, and GIF-based graphs only.

For more information about AvantGo, see the *WebFOCUS Technology Guide*.

Procedure How to Publish a Standard Report for Sync

In Managed Reporting, an Administrator publishes a Standard Report as follows:

1. Select the Standard Report you wish to make available for sync and right-click.
2. Select *Properties*. The Standard Report Properties dialog box opens.
3. Select the *PDA Sync* property and click *OK*.

Once the PDA Sync property is selected, the Standard Report is considered published for PDA Sync and is part of the syncable channel for mobile reports.

Note: You must set the PDA Sync property for each Standard Report you want to make available for sync.

PDA Sync and OLAP

The PDA Sync option supports immediately run Standard Reports and deferred Standard Reports (since these return HTML). However, it cannot support OLAP reports since they return HTML with JavaScript and references to Java applets.

If a user syncs a report that has Run with OLAP checked, the report is synced to the PDA as a normal file. In other words, OLAP is disabled.

Syncing Deferred Reports

As a Managed Reporting Administrator, you can configure deferred reports to sync with a PDA by selecting both the *Only run as a Deferred Report* and *PDA Sync* properties for that Standard Report.

Subsequently, every time you sync a report over AvantGo, the report is submitted for processing. A sync operation runs every single report, every time, based on the frequency option set up for the AvantGo Channel.

However, users may not want deferred reports to be submitted for processing every time. These tend to be the longest-running reports, and sync operations would take a long time to run these reports. To resolve this potential problem, the WebFOCUS Client returns a Web form page that allows the user to request the deferred report as follows:

If the user clicks Defer, the form is submitted and stored in the AvantGo Forms Manager until the next sync, at which time the report is submitted for deferred processing. On the next sync, if the report has finished processing, it is downloaded for viewing in the AvantGo browser, which displays the Web content on the PDA.

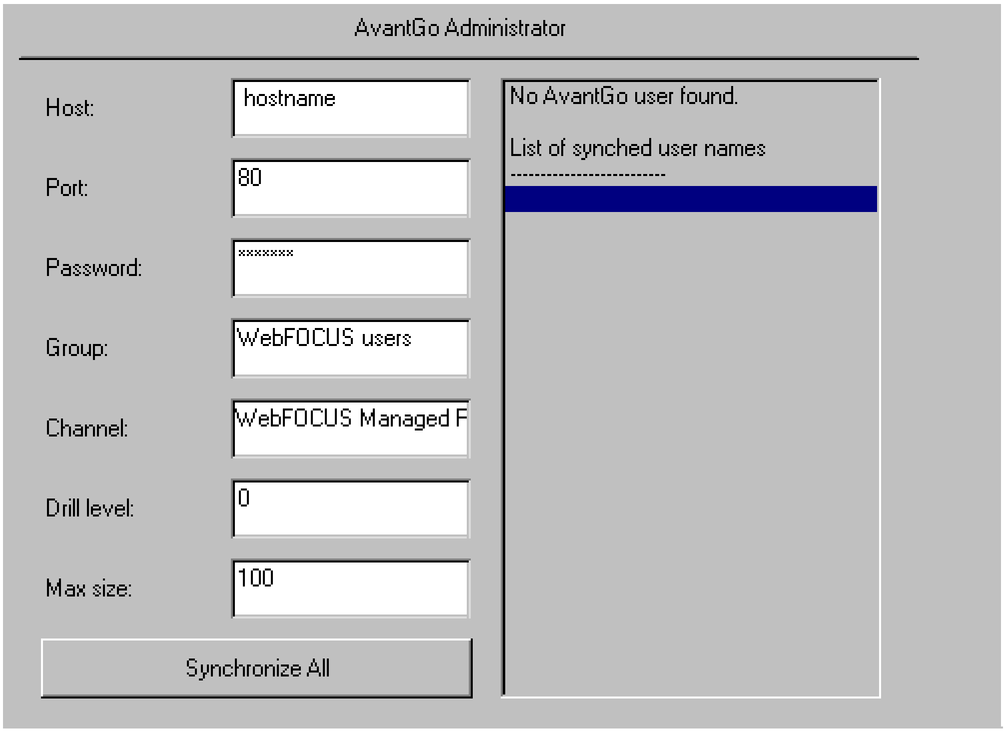
Creating a Channel From the Managed Reporting Repository

To turn the current Managed Reporting Repository into an AvantGo channel, you use the PDA Sync tab, which can be accessed from the gray toolbar. This opens the AvantGo Administrator panel, which contains properties that control how the Repository is exported to an AvantGo channel.

These panels are HTML-based, with client-side JavaScript for validation and WebFOCUS Client support as needed.

AvantGo Administrator Panel

When you click the PDA Sync tab from the gray toolbar, the AvantGo Administrator panel opens.



The AvantGo Administrator panel controls how Managed Reporting locates and logs on to the AvantGo Enterprise Server. It creates AvantGo groups and channels on the AvantGo Enterprise Server, and the properties for all AvantGo optioned users. The AvantGo Administrator panel automates AvantGo setup for you.

Reference AvantGo Administrator Panel Properties

The AvantGo Administrator panel properties are as follows:

Properties	Description	Default value (pre-filled, first time only)
Host	The Web domain used to send commands to the AvantGo CGI on the AvantGo Enterprise Server. **Note:** This should be the domain only, not http:// or the port number.	[blank]
Port	The port on the AvantGo Enterprise Server where the AvantGo CGI listens for HTTP requests.	13000
Password	The AvantGo Administrator's password.	[blank]
Group	The name of the group on the AvantGo Enterprise Server to which the Repository channel will be added. All AvantGo users configured by WebFOCUS belong to this group.	WebFOCUS users
Channel	The name that will be used for the channel on the AvantGo Enterprise Server.	WebFOCUS Managed Reporting
Drill level	The number of levels of report drill-downs the channel will perform.	2
Max size	Depending on the amount of content Managed Reporting contains, you might be able to leave this setting at the default of 100K or you might need to make it larger. **Note:** The AvantGo sync server and client compresses the HTML content. Even though the content that is synced can use up the full amount of space, you are actually getting more space in terms of real HTML page size.	100 (KB)

Note: When you delete the values and return to the PDA Sync Console, you need to reenter the default values.

Reference Updating an AvantGo Channel

To update AvantGo and refresh the contents of the WebFOCUS Managed Reporting configuration files, click the *Synchronize All* button on the AvantGo Administrator panel. The WebFOCUS Client checks these files before trying to access the AvantGo Enterprise Server to perform maintenance functions.

When you click *Synchronize All* on the PDA Sync panel, the following occurs:

1. The WebFOCUS Client logs onto the AvantGo Enterprise Server and issues a query to see if a group with the name specified already exists. If it exists, it uses that group. If it does not exist, the Client sends a command to create the group.
2. The WebFOCUS Client queries the AvantGo Enterprise Server to see if the specified channel already exists. If it exists, the channel's properties are updated from the contents of this panel. If it does not exist, the Client sends a command to create it using the properties of this panel.

Setting Up a Managed Reporting User for PDA Sync

Each user licensed for PDA Sync needs to be enabled for this feature in the Managed Reporting User Administration panel, as described in *How to Set Up a Managed Reporting User for PDA Sync* on page 15-6.

Procedure How to Set Up a Managed Reporting User for PDA Sync

1. Click *User Administrator* from the gray toolbar.
2. Click the *Users* tab.
3. Select the user you wish to enable for sync (for example, jsmith).
4. Right-click and select *Properties*.

   The User Administrator - User Properties dialog box opens.
5. In the User Privileges section, select the *PDA Sync* property and click *OK*.

Note: This property is used for adding or updating Managed Reporting users on the AvantGo Enterprise Server.

Additional AvantGo Installation Files for PDA Sync

For the PDA Sync console in Managed Reporting to function, you must manually install a set of files onto the AvantGo Enterprise Server. These files enable WebFOCUS to perform maintenance on the AvantGo Enterprise Server. The PDA Sync console calls functions that are embedded in these files. These functions perform the following tasks:

- Setting up AvantGo users.
- Creating user groups.
- Setting up AvantGo Channels.
- Providing user access to groups within channels.

Procedure How to Install the Additional Files on Your AvantGo Enterprise Server

The following steps must be performed *after* installing WebFOCUS and the AvantGo Enterprise Server.

1. Create a directory for the files on your AvantGo Enterprise Server called ibi. This must be located in the following subdirectory:

   `drive:\AvantGoroot\www\apps\enterprise\`

   where:

   `drive`

   Is the drive where you installed the AvantGo Enterprise Server.

   `AvantGoroot`

   Is the root directory of the AvantGo Enterprise Server. The default root directory is AvantGoServer.

2. Once you have created the above directory, navigate to the following directory on the WebFOCUS CD:

   WebFOCUS436\AvantGo36

3. Copy all of the files in this directory (but not the folder itself) to the ibi subdirectory created in step 1.

WebFOCUS Version 4.3.6 and higher have been certified to work with AvantGo Enterprise Server Version 3.6.

Subscribing to a Channel

Once you have published a channel, mobile users must subscribe to that channel in order to receive any data. Users automatically receive subscriptions that you have created when they sync their PDAs. They must login to that channel with the user IDs and passwords for AvantGo that you have set up from Managed Reporting.

CHAPTER 16

Two-Way Email Administration

Topics:

- How Two-Way Email Works
- Creating a Template
- Maintaining a Template
- Sending a Template to Users
- Attaching a Two-Way Email Template to an Alert
- Accessing the Administrator Console
- Adding or Deleting a Subscriber
- Maintaining an E-mail Address
- Refreshing a User's Templates
- Using the Job Log
- Using the Event Log
- Checking the Status of a Job or Canceling a Job

Two-Way Email enables a mobile business professional to receive a WebFOCUS report through e-mail, using a handheld device, laptop, or desktop.

As a Managed Reporting Administrator or Domain Admin, you use Managed Reporting to create and maintain Two-Way Email templates, the means by which a user requests a report.

As a Managed Reporting Administrator and ReportCaster Administrator, you also use the Two-Way Email Administrator console to manage subscriber information, monitor the execution of report requests, cancel requests, and perform other administrative tasks.

This topic describes several features of Two-Way Email, such as its processing steps, that will help Administrators understand their tasks and oversee the Two-Way Email capability. It also includes instructions on performing specific tasks. Finally, it addresses the tasks that a Managed Reporting Administrator and ReportCaster Administrator performs using the Two-Way Email Administrator console.

How Two-Way Email Works

With Two-Way Email, mobile business professionals have access to their company's enterprise data, from any location, at any time.

The following basic activities enable the Two-Way Email capability. The Managed Reporting Administrator or Domain Admin performs some activities, and the user performs others:

- The Managed Reporting Administrator or Domain Admin creates Two-Way Email templates from Standard Reports in Managed Reporting.
- The Managed Reporting Administrator and ReportCaster Administrator subscribes a first-time user to Two-Way Email using the Two-Way Email Administrator console, or a user subscribes independently from an HTML subscription page supplied with Two-Way Email.
- Two-Way Email sends the user a confirmation message through e-mail, acknowledging the subscription request. The user receives and replies to this message.
- Two-Way Email sends the user the templates allowed for use. The user stores them in the inbox or in a folder on the e-mail client.

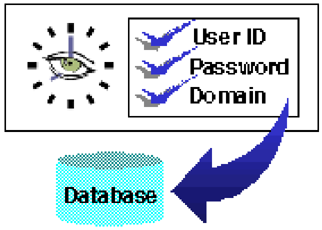
The user simply replies to and sends a template to receive the associated report.

Details on the processing behind these activities follow.

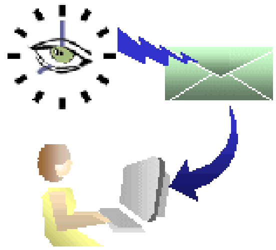
Subscription and Confirmation Processing

The following steps take place when a new user subscribes to Two-Way Email using an HTML subscription page. A Managed Reporting Administrator and ReportCaster Administrator can also subscribe a new user from the Two-Way Email Administrator console.

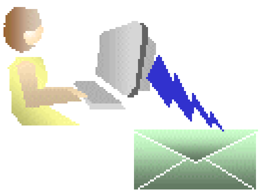
From a browser, a user accesses the HTML subscription page and supplies the Managed Reporting user ID and password, WebFOCUS Reporting Server user ID and password, and e-mail address.



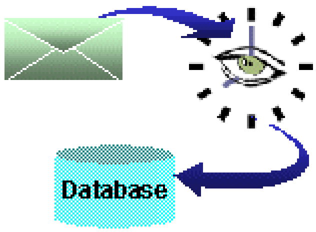
Two-Way Email checks the user ID/password and domain authorization, links the security credentials to the applicable templates, and creates a new user record in the Two-Way Email user database.



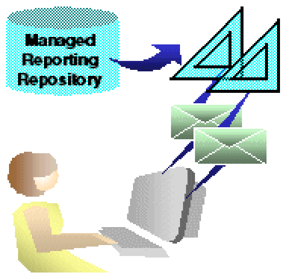
Two-Way Email sends a confirmation message to the user through e-mail.



The user receives and replies to the confirmation message through e-mail, using a handheld device, laptop, or desktop.



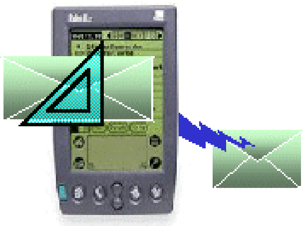
Two-Way Email receives the confirmation reply and verifies the Reply-To address in the user record in the Two-Way Email database.



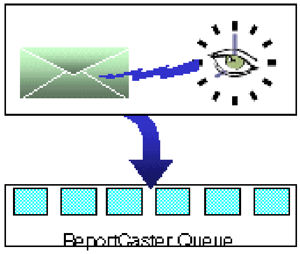
Two-Way Email retrieves the applicable templates from the Managed Reporting Repository and sends them to the validated, registered user as e-mails.

Report Request Processing

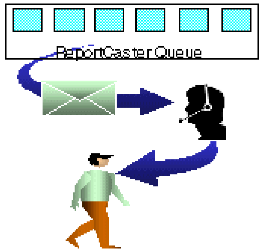
The following steps take place when a user requests a report.



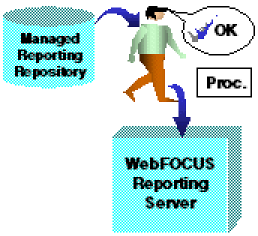
In the handheld device, laptop, or desktop from the e-mail client, the user selects, replies to, and sends a template. The e-mail is routed to an e-mail server.



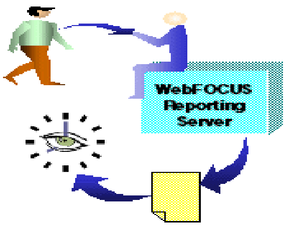
The Two-Way Email Listener monitors its inbox on the e-mail server and detects the request. It validates the sender's address as a subscriber's address and queues the request.



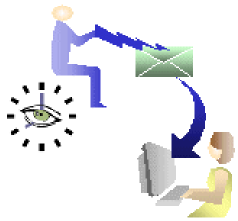
The Two-Way Email Dispatcher takes the request off the queue and starts a Worker thread.



The Worker checks the security credentials from Managed Reporting, retrieves the Standard Report procedure, merges it with parameter values, and sends it to the WebFOCUS Reporting Server for processing.



The Worker starts an agent on the WebFOCUS Reporting Server. The server runs the procedure with any parameter values. The Reporting Server sends output back to the Distribution Server. The Distribution Server sends the e-mail.



The WebFOCUS Reporting Server sends the report to the user as e-mail. The user receives the report.

Secured Message Delivery

Two-Way Email provides the same level of secured message delivery as that provided by Simple Mail Transfer Protocol (SMTP).

Managed Reporting enables central management of user access to data. As a Managed Reporting Administrator, you use standard Managed Reporting security features to establish the credentials and access privileges of a user. You need to:

- Assign a Managed Reporting user ID and password to each Two-Way Email user.
- Grant authorized users access to certain domains.

Security in the Subscription and Confirmation Procedure

See *Subscription and Confirmation Processing* on page 16-3 for an illustration of this procedure.

For a first-time subscriber, Two-Way Email checks the Managed Reporting user ID and password and the domain authorization. It creates a new subscriber record in the Two-Way Email database and sends a confirmation message to the e-mail address supplied. This message enables validation of the correct Reply-To address for the subscriber, since Two-Way Email actually uses the address to acknowledge the subscription request.

Once Two-Way Email receives the subscriber's reply to the message, it stores the correct address in the Two-Way Email database.

The subscriber's credentials are also linked to the allowed Two-Way Email templates. That information is encrypted to provide additional security.

Security in the Report Request Procedure

See *Report Request Processing* on page 16-4 for an illustration of this procedure.

When a subscriber sends a request for a report, Two-Way Email makes sure that the Reply-To e-mail address of the sender is the same as the e-mail address of the subscriber. This security feature prevents unauthorized users from gaining access to reports.

Two-Way Email also verifies the content of the request, to make sure it is a Two-Way Email request. If it is not, Two-Way Email sends the request to an error account.

Error Account

When a user requests a report, Two-Way Email examines the content of the request. Non-Two-Way Email requests are sent to an error account. The e-mail address for this account is specified during WebFOCUS installation.

Make sure that someone periodically checks and cleans up the error account.

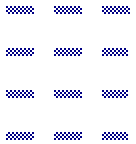
Report Display Considerations

A report displayed on a handheld device is text based and does not support formatting options such as font size or color.

As a Managed Reporting Administrator or Domain Admin, you are responsible for designing reports that are compatible with the display device. Reports may require tailoring for small screen presentation.

Possible display options include the following.

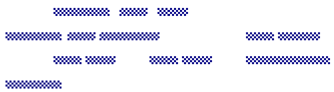
- Narrow, tabular display:

  Use the WebFOCUS PRINT and SUM commands to create tabular display. For example:

  ```
  SET STYLE=OFF, PAGE-NUM=OFF
  TABLE FILE GGSALES
  SUM UNITS DOLLARS
  BY CATEGORY
  END
  ```

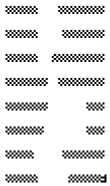
- Free-form display:

  Use the WebFOCUS HEADING command to create free-form display. For example:

  ```
  SET STYLE=OFF, PAGE-NUM=OFF
  TABLE FILE GGSALES
  HEADING
  "<3>UNITS SOLD FOR COFFEE"
  "<5>AND BUDGETED UNITS"
  "CATEGORY: <CATEGORY>"
  "<4>UNITS SOLD:      <UNITS>"
  "<4>BUDGETED UNITS:  <BUDUNITS>"
  FOOTING
  "<8>Confidential"
  BY CATEGORY
  WHERE CATEGORY EQ 'Coffee'
  END
  ```

- Stacked display:



Use the WebFOCUS OVER command to create stacked display. For example:

```
SET STYLE=OFF, PAGE-NUM=OFF
TABLE FILE GGSALES
SUM UNITS OVER
BUDUNITS OVER
COMPUTE DIFF_UNITS = BUDUNITS - UNITS; OVER
DOLLARS OVER
BUDDOLLARS OVER
COMPUTE DIFF_DOLLARS = BUDDOLLARS - DOLLARS;
END
```

See the *Creating Reports for WebFOCUS Language* manual for details on report display and syntax.

Alert Response

Two-Way Email alert response is available only at sites that have licensed and installed both ReportCaster and Two-Way Email. For information on ReportCaster, see Chapter 17, *ReportCaster Alerts Administration*.

A Managed Reporting Administrator or Domain Admin can attach a Two-Way Email template to a ReportCaster Alert. The user is alerted when certain pre-defined data conditions are met, and can use the attached template to respond to the alert to request a report for more detail.

Creating a Template

As a Managed Reporting Administrator or Domain Admin, you create a Two-Way Email template, or multiple templates, from an existing Standard Report.

A template may or may not contain parameters requiring values from the user. You do not need to prompt the user for all of the parameters in a Standard Report. You can set any parameter to a value appropriate for the user.

Procedure How to Create a Template Without Parameters

1. From Managed Reporting, right-click the Standard Report from which you want to create a Two-Way Email template.

   On the pop-up menu, click *New Two-Way Email Template* to open the New Two-Way Email Template dialog box.

   Another way to open the dialog box is to select the Standard Report, and click the first icon on the toolbar (the one farthest to the left), labeled New Two-Way Email Template.

2. On the New Two-Way Email Template dialog box, enter the subject of the template in the Subject Line field. This value displays as the subject of the e-mail sent to the user.

   Two-Way Email uses the name of the Standard Report as the default subject, followed by a Two-Way Email identifier (for example, TW).

3. Enter a description of the template, or an informative message for the user, in the Ending Message field.

   This description or message displays in the body of the Two-Way Email template.

4. Click *Email Preview* to display the template as the user will see it.

   You can use RIM® (Research In Motion Limited) or Palm™ handheld emulation to preview the template. Toggle between the two emulators by holding down the Shift key and clicking *Email Preview*.

   Close the preview window when you are done. Click *OK* on the Two-Way Email window.

   The Save New 'Two-Way Email' window displays.

5. Enter the name of the template as it will display in Managed Reporting under the associated Standard Report. Click *OK*.

   Two-Way Email displays the template's subject as the default name.

   The template is stored and displayed under the Standard Report from which it was created.

Example Creating a Template Without Parameters

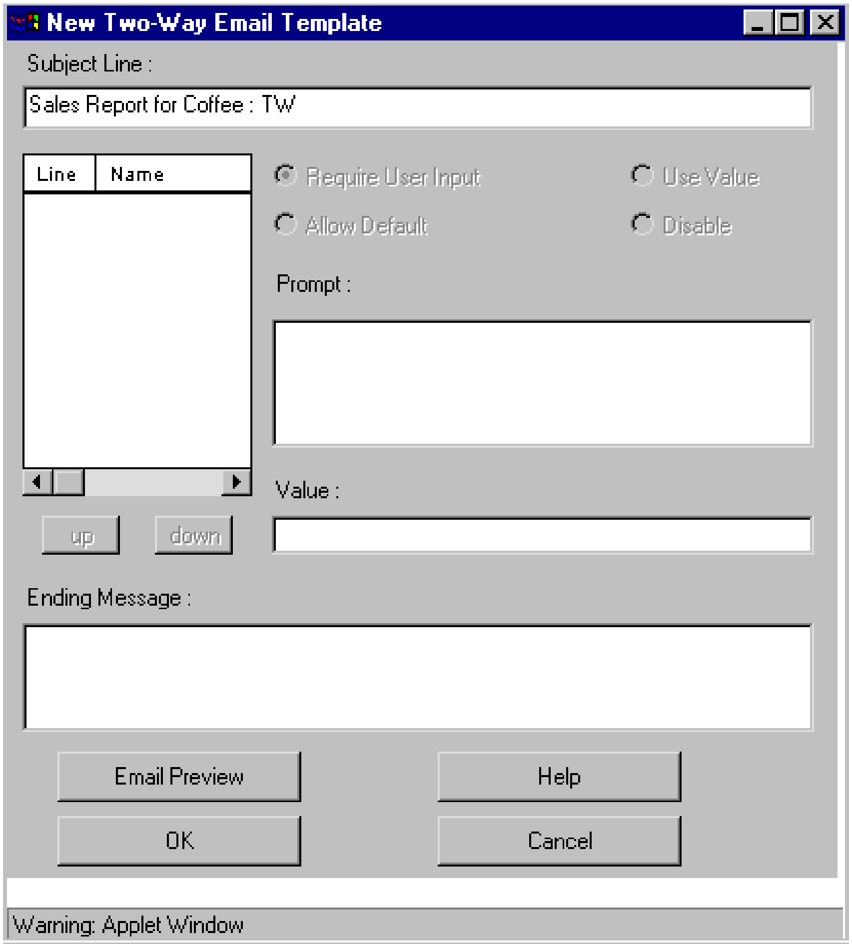
Suppose you want to create a Two-Way Email template from a Standard Report named Sales Report for Coffee.

The Standard Report is:

```
TABLE FILE GGSALES
SUM UNITS DOLLARS
BY CATEGORY
WHERE CATEGORY EQ 'Coffee'
END
```

1. From Managed Reporting, right-click the Standard Report named Sales Report for Coffee. On the pop-up menu, click *New*.

   The following window displays:



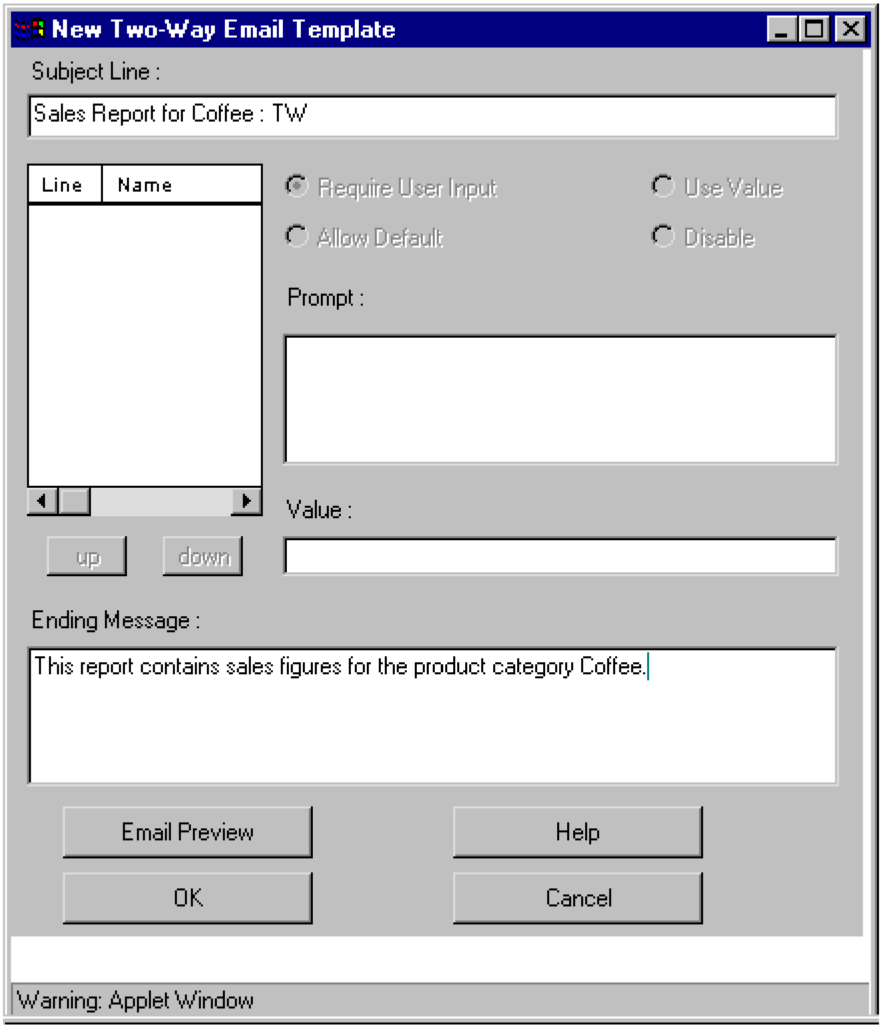
2. In the Subject Line field, accept the default subject of the template.

   This value displays as the subject of the e-mail sent to the user.

3. In the Ending Message field, enter the following as the description of the template:

4. This report contains sales figures for the product category Coffee.

5. This description displays in the body of the template.

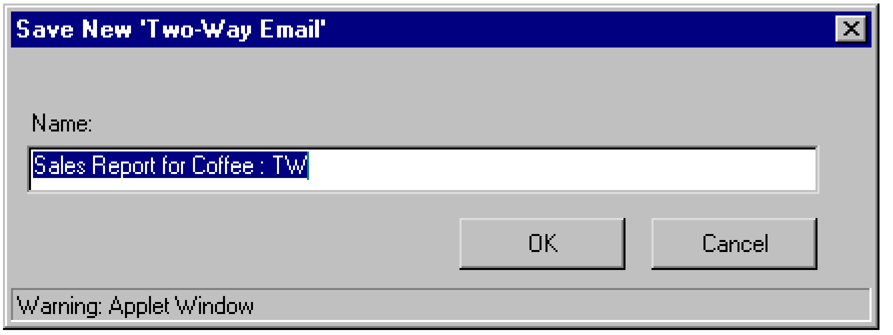


6. Click *Email Preview* to display the template as the user will see it.

   You can use RIM or Palm handheld emulation to preview the template. Toggle between the two emulators by holding down the Shift key and clicking *Email Preview*.

Close the preview window when you are done. Click *OK* on the Two-Way Email window.

The Save New 'Two-Way Email' window displays:



7. Accept the default template name by clicking *OK*. This value identifies the template in Managed Reporting under the associated Standard Report.

Procedure How to Create a Template With Parameters

1. From Managed Reporting, right-click the Standard Report from which you want to create a Two-Way Email template.

   On the pop-up menu, click *New Two-Way Email template*.

2. On the New Two-Way Email Template dialog box, enter the subject of the template in the Subject Line field. This value displays as the subject of the e-mail sent to the user.

   Two-Way Email uses the name of the Standard Report as the default subject, followed by a Two-Way Email identifier (for example, TW).

3. Enter a description of the template, or an informative message for the user, in the Ending Message field. For example, you may want to indicate valid values for a required parameter.

   This description or message displays in the body of the Two-Way Email template.

4. For each parameter, specify a property.

Property	Description
Require User Input	The user must supply a value for the parameter.
Allow Default	The user can supply a value or use the default value. Enter the default value in the field labeled Value. To accept a default value when requesting a report, the user must enter a period on the line corresponding to the parameter. A period is required to ensure that Two-Way Email reads the line.
Use Value	The Administrator supplies the value, which cannot be changed by the user. Enter the required value in the field labeled Value.
Disable	Does not prompt for a parameter value on the Two-Way Email template. Specify this property only when the parameter is already set on the WebFOCUS Reporting Server in a profile or stored procedure.

If you include multiple parameters in the template, click the *Up* and *Down* buttons to scroll through them. These buttons are only enabled when more than one parameter is specified.

5. If you click *Require User Input* or *Allow Default*, you can supply a prompt that the user will see in the template. For each parameter, enter the applicable prompt in the Prompt field.

If multiple parameter values are required, it is a good idea to indicate the line number on which each value should be supplied.

If a parameter has the property, Allow Default, instruct the user to enter a period (.) on the appropriate line to accept the default value.

6. Click *Email Preview* to display the template as the user will see it.

You can use RIM or Palm handheld emulation to preview the template. Toggle between the two emulators by holding down the Shift key and clicking *Email Preview*.

Close the preview window when you are done. Click *OK* on the Two-Way Email window. The Save New 'Two-Way Email' window displays.

Two-Way Email uses the subject of the template as the default name. This name identifies the template in Managed Reporting under the Standard Report.

7. Accept the default name, or enter another name for the template, and click *OK*.
8. The Two-Way Email template displays under the Standard Report from which it was created.

Example

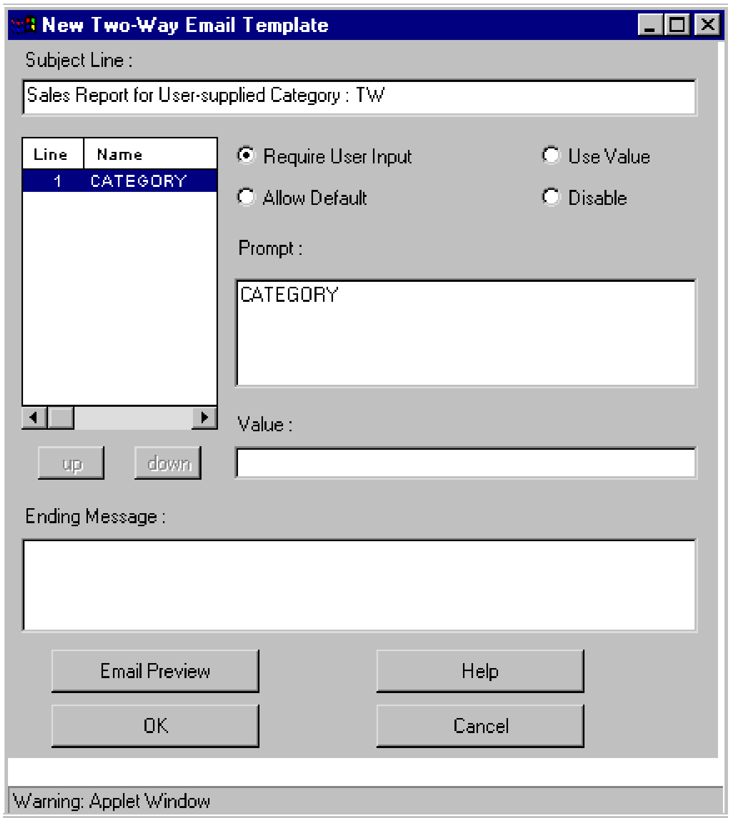
Creating a Template With a Parameter

Suppose you want to create a Two-Way Email template using a Standard Report named Sales Report for User-supplied Category. It provides sales information for a product category specified by the user. The Standard Report is:

```
TABLE FILE GGSALES
SUM UNITS DOLLARS
BY CATEGORY
WHERE CATEGORY EQ '&CATEGORY'
END
```

1. From Managed Reporting, right-click the Standard Report named *Sales Report for User-supplied Category*, from which you will create the template.

   On the pop-up menu, click *New*. The following window displays:



2. Use the default subject name of the template as displayed in the Subject Line field. This value displays as the subject of the e-mail sent to the user.
3. Enter the following informative message for the user in the Ending Message field:

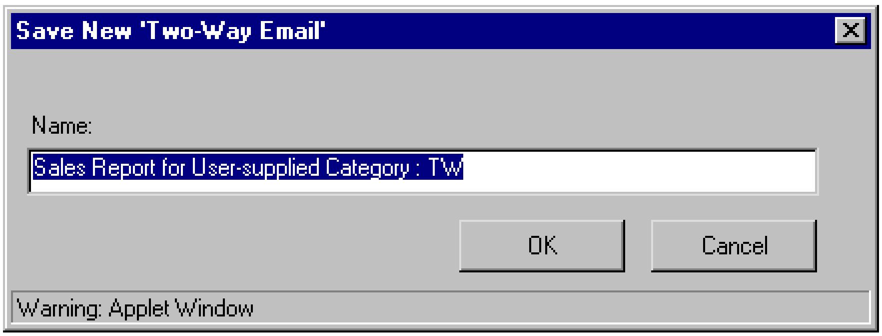
   Valid product categories are Coffee, Food, Gifts.
4. Confirm that the Require User Input radio button is selected.
5. Specify the following for the prompt that will display in the template. You can type over the word CATEGORY.

   Enter a product category on line 1 of your reply.
6. Click *Email Preview* to display the template as the user will see it.

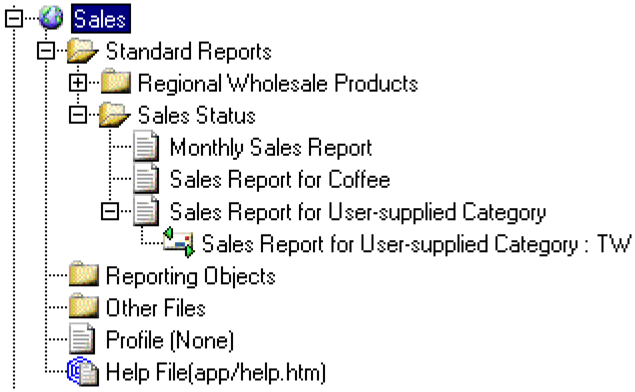
   You can use RIM or Palm handheld emulation to preview the template. Toggle between the two emulators by holding down the Shift key and clicking *Email Preview*.

   Close the preview window when you are done. Click *OK* on the Two-Way Email window.

   The Save New 'Two-Way Email' window displays:



7. Accept the default name of the template by clicking *OK*. This name identifies the template in Managed Reporting under the Standard Report.



Example Creating a Template With Multiple Parameters

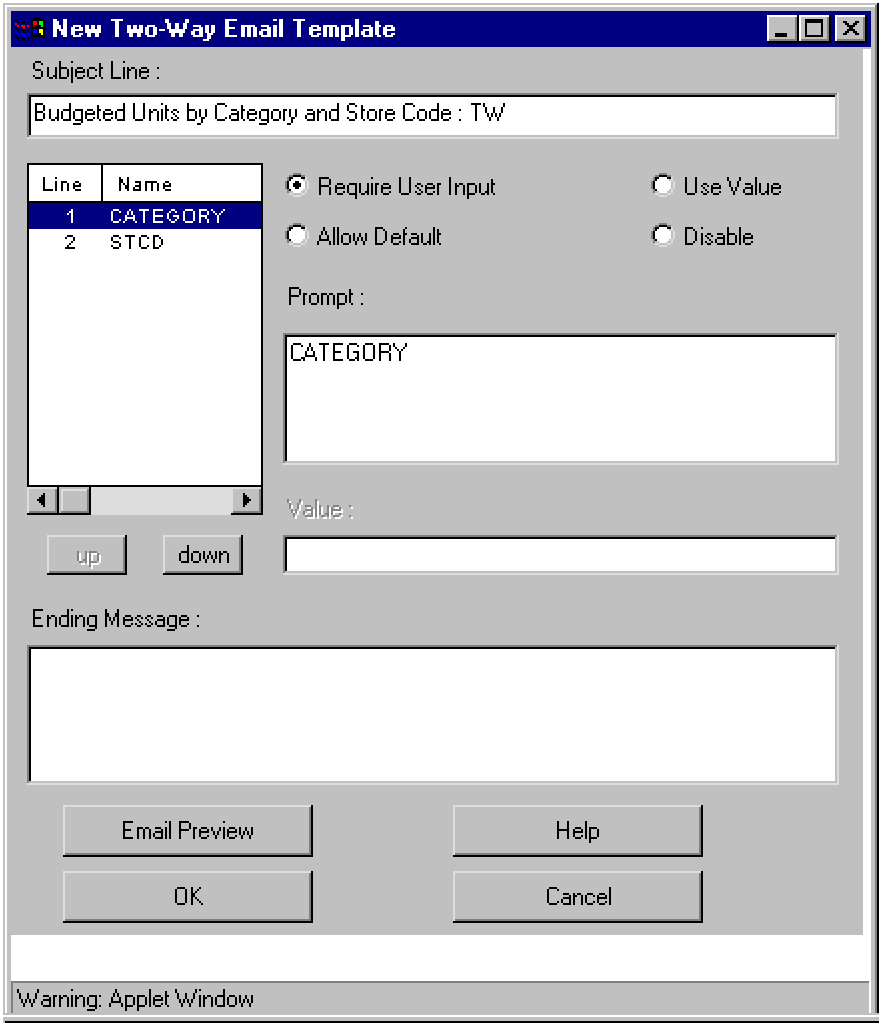
Suppose you want to create a Two-Way Email template using a Standard Report named Budgeted Units by Category and Store Code. It contains two parameters. For one parameter, CATEGORY, the user can supply a value or accept the default value provided by the Administrator. For the second parameter, STCD, the user must accept the value provided by the Administrator.

The Standard Report is:

```
TABLE FILE GGSALES
SUM BUDUNITS UNITS
BY CATEGORY
BY STCD
WHERE CATEGORY EQ '&CATEGORY'
WHERE STCD EQ '&STCD'
END
```

1. From Managed Reporting, right-click the Standard Report named *Budgeted Units by Category and Store Code*, from which you will create the template.

On the pop-up menu, click *New*. The following window displays:



2. Use the default subject name of the template as displayed in the Subject Line field. This value displays as the subject of the e-mail sent to the user.

3. The parameter CATEGORY is already highlighted, so you will define its properties first.

   Select *Allow Default*.

4. In the Value field, enter the default value, *Gifts*.

5. In the Prompt field, specify the following for the prompt that will display in the template. You can type over the word CATEGORY.

Enter a product category on line 1 of your reply.

Valid product categories are Coffee, Food, Gifts.

You can accept the default, which is Gifts.

To accept the default, enter a period (.) on line 1 of your reply.

6. Click the second parameter, STCD, to highlight it. You will now define its properties.

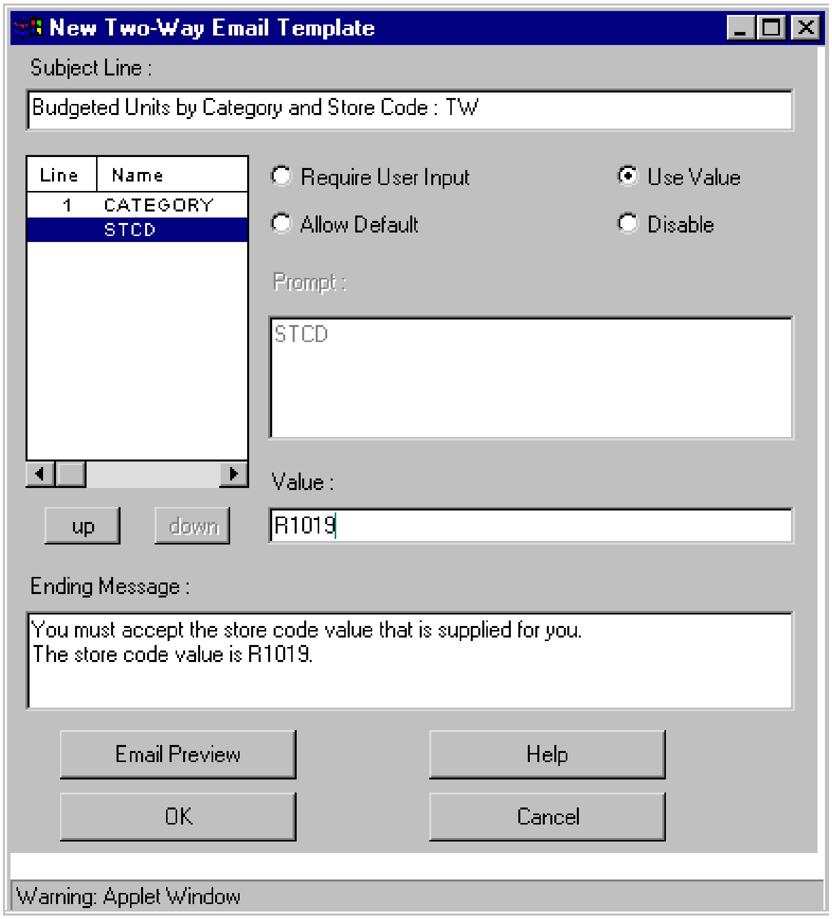
Enter the following informative message for the user in the Ending Message field:

You must accept the store code value that is supplied for you.

The store code value is R1019.

7. Select *Use Value*.

8. In the Value field, enter the only valid value, *R1019*.



9. If a parameter has the property Use Value, you do not specify a prompt for it.

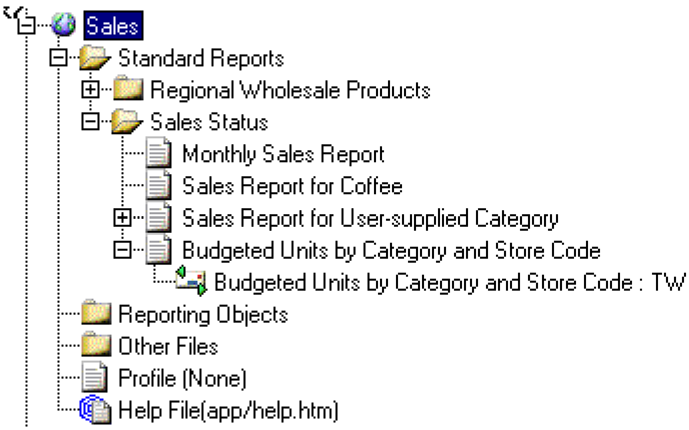
   Click *Email Preview* to display the template as the user will see it.

   You can use RIM or Palm handheld emulation to preview the template. Toggle between the two emulators by holding down the Shift key and clicking *Email Preview*.

   Close the preview window when you are done. Click *OK* on the Two-Way Email window.

   The Save New 'Two-Way Email' window displays.

10. Accept the default name of the template by clicking *OK*. This name identifies the template in Managed Reporting under the Standard Report.



Maintaining a Template

As a Managed Reporting Administrator or Domain Admin, you edit, rename, or delete an existing Two-Way Email template from Managed Reporting.

If you edit a Standard Report associated with a Two-Way Email template and then open the template, a message describes the change.

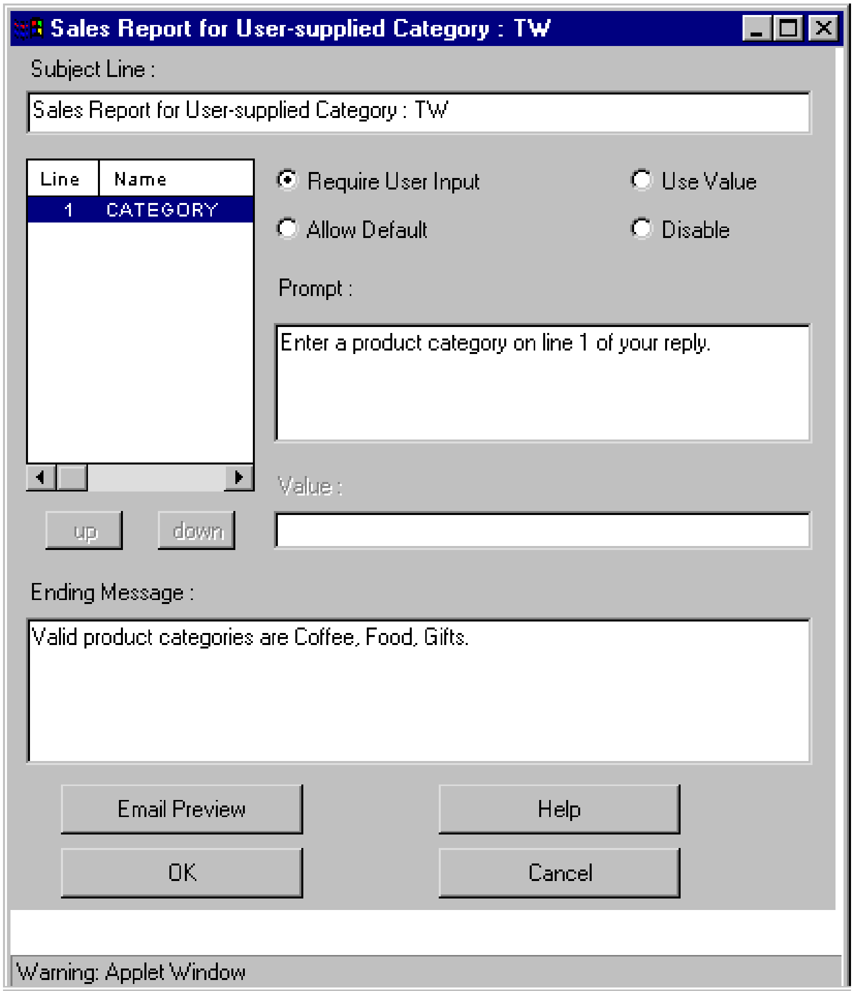
For example, if you remove a variable named CATEGORY from a Standard Report, you see the following when you open the template:

```
Variable 'CATEGORY' Has Been Deleted
```

Click *OK* to remove the message.

Procedure How to Edit a Template

1. From Managed Reporting, right-click the Two-Way Email template you want to edit.
2. Click *Open*. A window like the following displays:



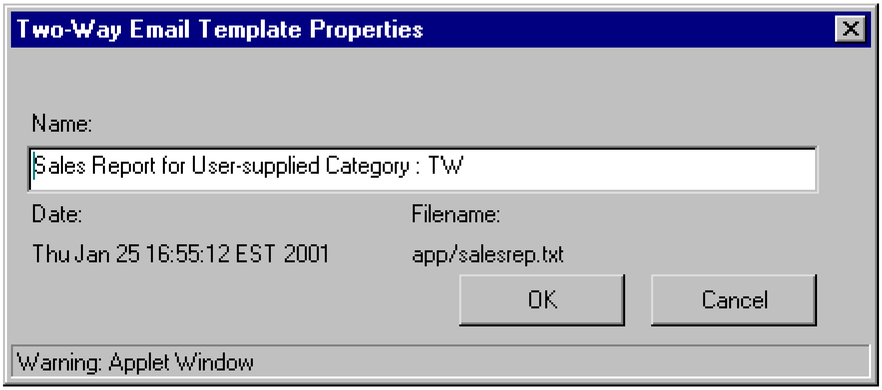
3. Make all necessary changes. Click *Email Preview* to make sure the template appears as desired.

   You can use RIM or Palm handheld emulation to preview the template. Toggle between the two emulators by holding down the Shift key and clicking *Email Preview*.

   Close the preview window when you are done. Click *OK* on the Two-Way Email window to save the changes.

Procedure How to Rename a Template

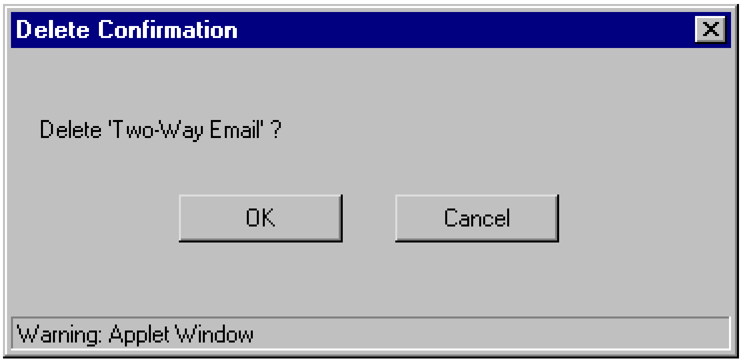
1. From Managed Reporting, right-click the Two-Way Email template whose name you want to change.
2. On the pop-up menu, click *Properties*. A window like the following displays:



3. Change the name of the template in the Name field, and click *OK*.

Procedure How to Delete a Template

1. From Managed Reporting, right-click the Two-Way Email template you want to delete.
2. On the pop-up menu, click *Delete*. The following window displays:



3. Click *OK* to delete the template.

Sending a Template to Users

As a Managed Reporting Administrator or Domain Admin, you will periodically create new templates or modify existing ones. You can send a copy of a new or modified template to authorized users.

Procedure How to Send a Template to Users

1. In Managed Reporting, right-click the new or modified template that you want to send.
2. On the pop-up menu, click *Resend Template*. Two-Way Email automatically sends a copy of the template to all users with authorized access to the associated domain.

Attaching a Two-Way Email Template to an Alert

This feature is available only at sites that have licensed and installed both ReportCaster and Two-Way Email. Two-Way Email is only available with ReportCaster.

A Managed Reporting Administrator or Domain Admin can attach a Two-Way Email template to a ReportCaster Alert. The user is alerted when certain pre-defined data conditions are met, and can use the attached template to respond to the alert to request a report for more detail, to redistribute a report or parts of it to other interested people, or to take other timely action.

For the procedure on attaching a Two-Way Email template to a ReportCaster Alert using the Alert Wizard, see Chapter 17, *ReportCaster Alerts Administration*.

The following example illustrates the basic steps required to attach a template to an alert. It assumes that you are familiar with the Alert Wizard and the creation of Two-Way Email templates. Alert response enables many event-critical activities other than the simple one illustrated here, including drill-down reporting or data source maintenance.

Example Attaching a Two-Way Email Template to an Alert

In this example, the user is alerted when the total coffee sales for store code R1019 exceed $1,000,000. You create this alert test in step 3.

The alert to the user takes the form of a report showing the exact amount of coffee sales for store code R1019. You create this alert event (report) in step 4.

Attached to the report is a template that prompts the user for another store code. You create this template in step 2.

The user enters the store code of interest for comparison purposes, and receives a second report showing the coffee sales for the supplied store code. You create the second report in step 1.

1. From Managed Reporting, create a Standard Report named Coffee Sales for Competitive Store. This is the comparison report the user receives after replying to and sending the template attached to the alert.

   This report displays the coffee sales for a store code supplied by the user, who wants to compare that figure to the coffee sales for store code R1019.

   ```
   TABLE FILE GGSALES
   SUM DOLLARS
   BY CATEGORY
   BY STCD
   WHERE CATEGORY EQ 'Coffee'
   WHERE STCD EQ '&STCD'
   END
   ```

2. From Managed Reporting, create a template from the preceding Standard Report. Use the instructions in *How to Create a Template With Parameters* on page 16-11. The template prompts the user for a store code.

   Perform the following when creating the template:

   a. Accept the default subject name in the Subject Line field.

   b. Select *Require User Input*.

   c. In the Ending Message field, enter:

      ```
      Valid store codes are R1088, R1109, R1250.
      ```

   d. In the Prompt field, enter:

      ```
      Enter a store code on line 1 of your reply.
      ```

3. Using the Alert Wizard, create an alert test as follows. An alert test defines the data condition that is monitored—in this example, when the total coffee sales for store code R1019 exceed $1,000,000.

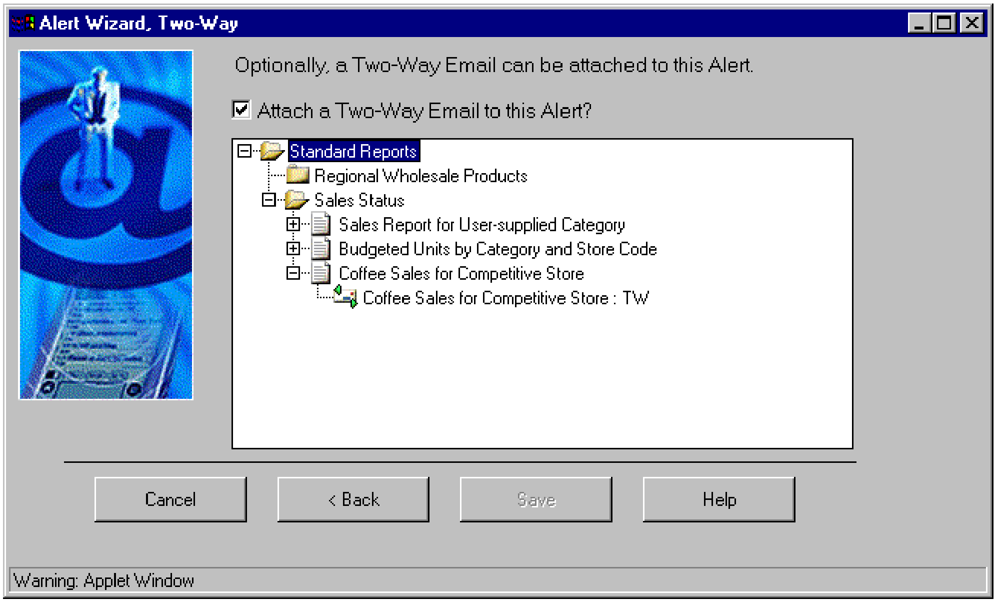
   ```
   TABLE FILE GGSALES
   SUM DOLLARS
   BY CATEGORY
   BY STCD
   WHERE CATEGORY EQ 'Coffee'
   WHERE STCD EQ 'R1019'
   WHERE TOTAL DOLLARS GT 1000000
   ON TABLE HOLD
   END
   ```

4. Using the Alert Wizard, create an alert event as follows. An alert event is the report that is distributed if the alert test is true.

```
TABLE FILE GGSALES
SUM DOLLARS
BY CATEGORY
BY STCD
WHERE CATEGORY EQ 'Coffee'
WHERE STCD EQ 'R1019'
WHERE TOTAL DOLLARS GT 1000000
END
```

5. Using the Alert Wizard, select *Attach a Two-Way Email to this Alert*.

6. Select the template named Coffee Sales for Competitive Store: TW, as shown in the following window:



7. Using the Alert Wizard, name the new alert report Coffee Sales Alert. Schedule the alert for testing once a day.

   For the Subject on the Distribution tab in the ReportCaster schedule, enter *Coffee Sales Alert*.

Accessing the Administrator Console

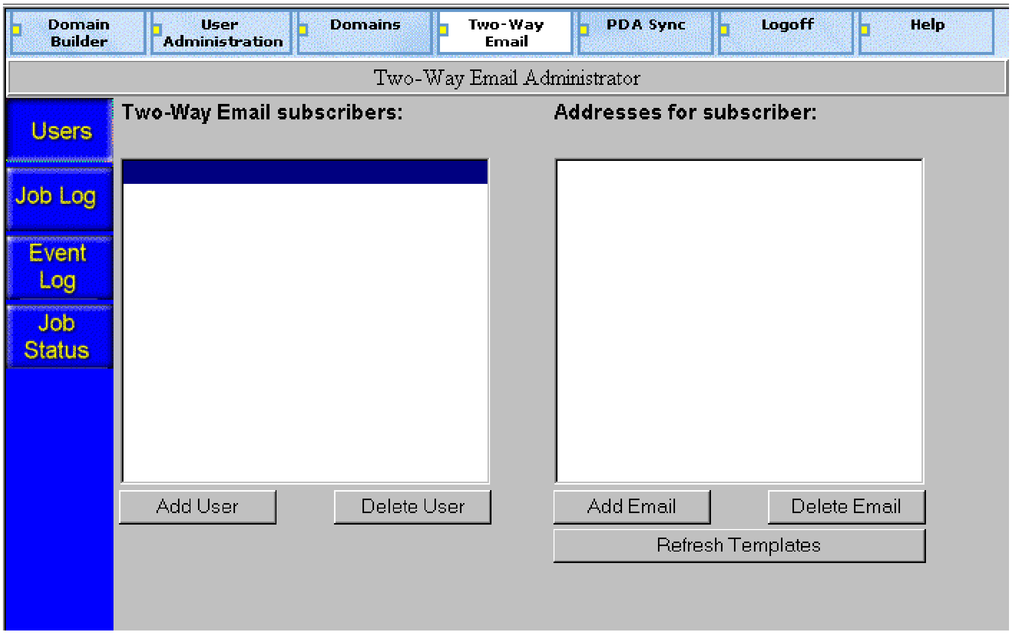
The Two-Way Email Administrator console enables the Managed Reporting Administrator to perform the following:

- View Managed Reporting users currently subscribed to Two-Way Email and their e-mail addresses.
- Add a new subscriber or delete an existing one.
- Maintain a user's e-mail address.
- Resend all templates to a user. This feature is called refreshing the templates.
- View the status of an executed job using the Job Log and purge the Job Log.
- Monitor e-mail traffic using the Event Log and purge the Event Log.
- Check the status of an executing job or a queued job (one that is waiting to be sent to the WebFOCUS Reporting Server for execution). You can also cancel a queued job.

The console is a set of HTML pages accessed from the Managed Reporting blue toolbar.

Procedure How to Access the Console and View Current Subscribers

1. On the Managed Reporting blue toolbar, click *Two-Way Email*.
2. The Two-Way Email Administrator console opens in a scrollable window:



The console displays the following:

- All Managed Reporting users currently subscribed to Two-Way Email, listed on the left under Two-Way Email subscribers.
- All e-mail addresses for a selected user, listed on the right under Addresses for subscriber.

You can only select one user at a time from the left-hand list. However, you can select more than one address from the right-hand list when you are deleting multiple addresses, or selecting addresses for a refresh task.

Adding or Deleting a Subscriber

Use the Administrator console to add a new subscriber to the Two-Way Email database, or delete an existing subscriber from the database.

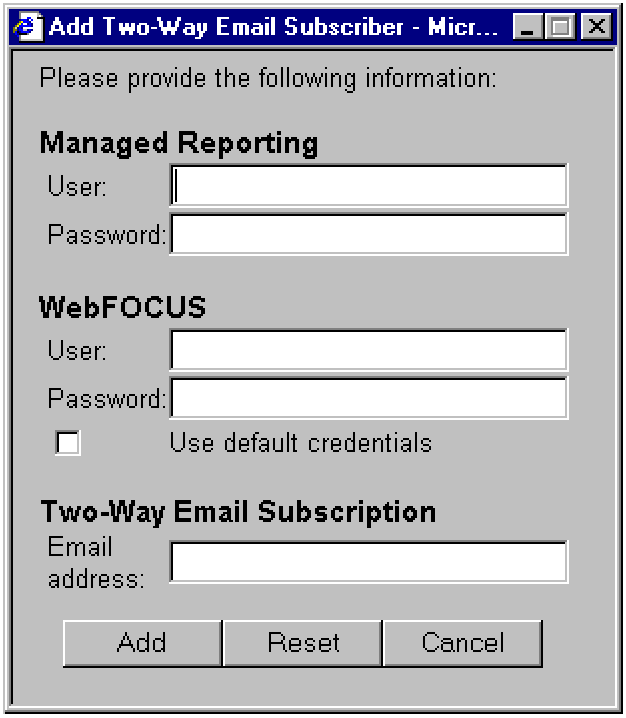
When a Managed Reporting Administrator adds a new subscriber using the Two-Way Email Administrator console, that subscriber receives a confirmation message from Two-Way Email, acknowledging the subscription request. The user must reply to the message. The subscription is activated once the confirmation process is complete.

See *Subscription and Confirmation Processing* on page 16-3 for more information on that procedure.

Procedure How to Add a New Subscriber

1. Select *Two-Way Email* on the Managed Reporting blue toolbar to access the Two-Way Email Administrator console.
2. Click *Add user*.

The following window displays:



3. Enter the Managed Reporting user ID and password.
4. Enter the WebFOCUS Reporting Server user ID and password. To use default values specified in the Two-Way tab in the ReportCaster Server Configuration Tool, click *Use default credentials*.
5. Enter the user's e-mail address in the field under Two-Way Email Subscription. Click *Add*. Two-Way Email will list the new user under Two-Way Email subscribers.

   If the user already has a Two-Way Email account, you receive a message informing you that the subscription procedure failed for that reason.

   If you make a typing error on the window, click *Reset* to clear the fields and start over.

Procedure How to Delete an Existing Subscriber

1. Select *Two-Way Email* on the Managed Reporting blue toolbar to access the Two-Way Email Administrator console.
2. Select the name of the subscriber you want to delete from the list on the left, under Two-Way Email subscribers.

Click *Delete user*. A window displays, with the name of the selected subscriber.

3. Click *Delete* to remove the subscriber from the Two-Way Email database.

Maintaining an E-mail Address

For any Two-Way Email user, you can:

- Add a new e-mail address to the Two-Way Email database.
- Delete an existing e-mail address from the Two-Way Email database. You can delete multiple addresses at one time.

When you add a new e-mail address, the user receives a confirmation message at the new address from Two-Way Email and must reply to it. The new address is activated once the confirmation process is complete.

See *Subscription and Confirmation Processing* on page 16-3 for more information on that procedure.

Procedure How to Add a New E-mail Address

1. Select *Two-Way Email* on the Managed Reporting blue toolbar to access the Two-Way Email Administrator console. Using the console, select the user from the list on the left, under Two-Way Email subscribers.
2. Click *Add Email*.
3. On the next dialog box, type the new e-mail address in the field. Click *Add*.

Procedure How to Delete an Existing E-mail Address

1. Select *Two-Way Email* on the Managed Reporting blue toolbar to access the Two-Way Email Administrator console. Using the console, select the user from the list on the left, under Two-Way Email subscribers.
2. Select the address, or addresses, you want to remove from the list on the right, under Addresses for subscriber.
3. Click *Delete Email*.
4. On the next dialog box, click *Delete*.

   If you delete the only e-mail address associated with a user, the user's subscription to Two-Way Email (that is, the user's account) is cancelled. You have an opportunity to proceed with that action or discontinue the procedure.

Refreshing a User's Templates

You can resend a user's templates to a single e-mail address or to multiple addresses for that user.

Procedure How to Refresh a User's Templates

1. Select *Two-Way Email* on the Managed Reporting blue toolbar to access the Two-Way Email Administrator console. Using the console, select the user from the list on the left, under Two-Way Email subscribers.
2. Select the address, or addresses, that the templates will be sent to, using the list on the right, under Addresses for subscriber.
3. Click *Refresh Templates*.
4. Click *OK* to resend the templates the subscriber is authorized to use.

Using the Job Log

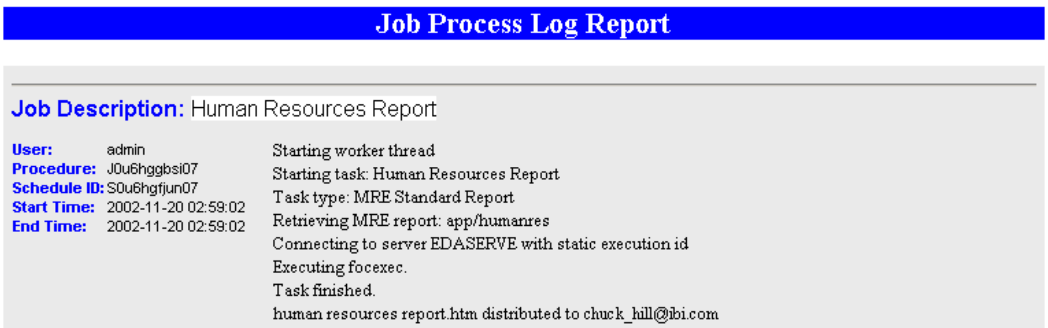
Use the Job Log to view information about a job (Standard Report procedure) sent to the WebFOCUS Reporting Server for execution.

The Job Log is an HTML page that displays in a browser window.

Viewing the Status of an Executed Job

The Job Log displays information about the activities that occurred during the execution and distribution of a report. It enables you to confirm that a report was executed and distributed successfully. If a job does not conclude as expected, the Job Log states the reason why.

The following is a sample entry from a Job Log:

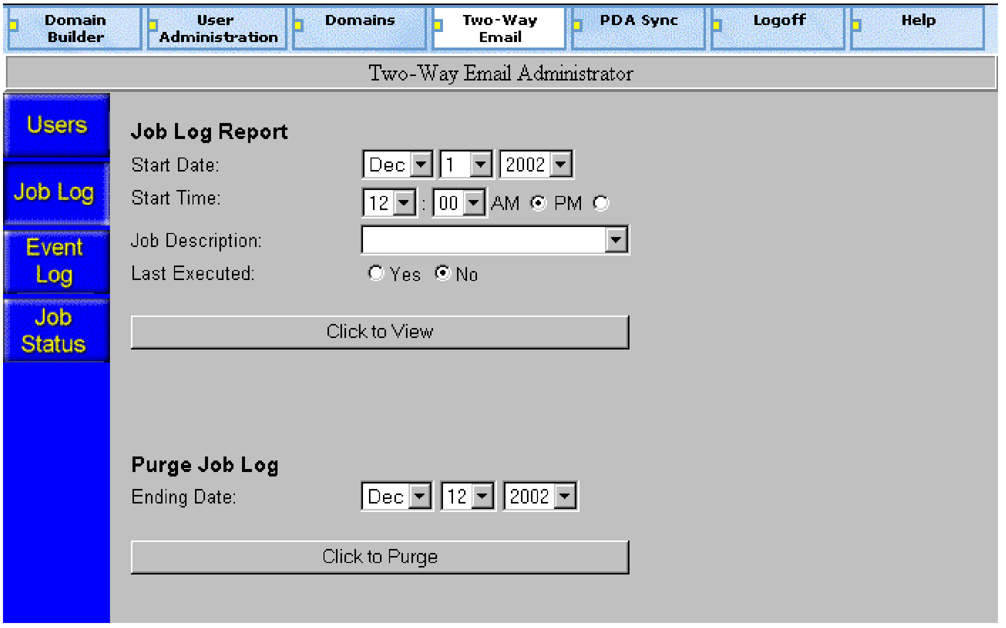


It includes the following:

- **Two-Way Email Job Description.** The name of the template associated with the job.
- **Server User.** The WebFOCUS Reporting Server user ID.
- **Managed Reporting User.** The Managed Reporting user ID.
- **Process.** A unique, system-generated key that identifies a specific execution of the template.
- **Job Name.** The name of the Managed Reporting Standard Report procedure, preceded by **app** and the delimiter /.
- **Start Time.** The date and time the job started running.
- **End Time.** The date and time the job finished running.
- **Messages.** Details on the activities that took place during job execution and distribution.

Procedure How to View the Status of an Executed Job

1. Select *Two-Way Email* on the Managed Reporting blue toolbar to access the Two-Way Email Administrator console. Click the Job Log tab on the left to display a window like the following:



2. Apply selection criteria to define the information that will be retrieved:
   - Use the drop-down lists for Start Date and Start Time to specify the beginning of the timeframe. Information on all jobs run from that date and time up to the current date and time will be retrieved.
   - Enter the name of a specific Two-Way Email template in the Job Description field. Information only for the jobs associated with that template during the specified timeframe will be retrieved.
   - Select *Yes* for Last Executed. Information only for the most recently executed job associated with the template (Job Description) during the specified timeframe will be retrieved.
3. Click *Click to View* to display the Job Log report.

Purging the Job Log

Because the Job Log accumulates information and can become difficult to navigate, it is a good idea to periodically purge it to conserve space.

You can control automatic purging of the Job Log at predefined intervals of time. Edit the parameter LOG_PURGE_PERIOD in the schedule section of the Distribution Server's bkrsched.cfg file.

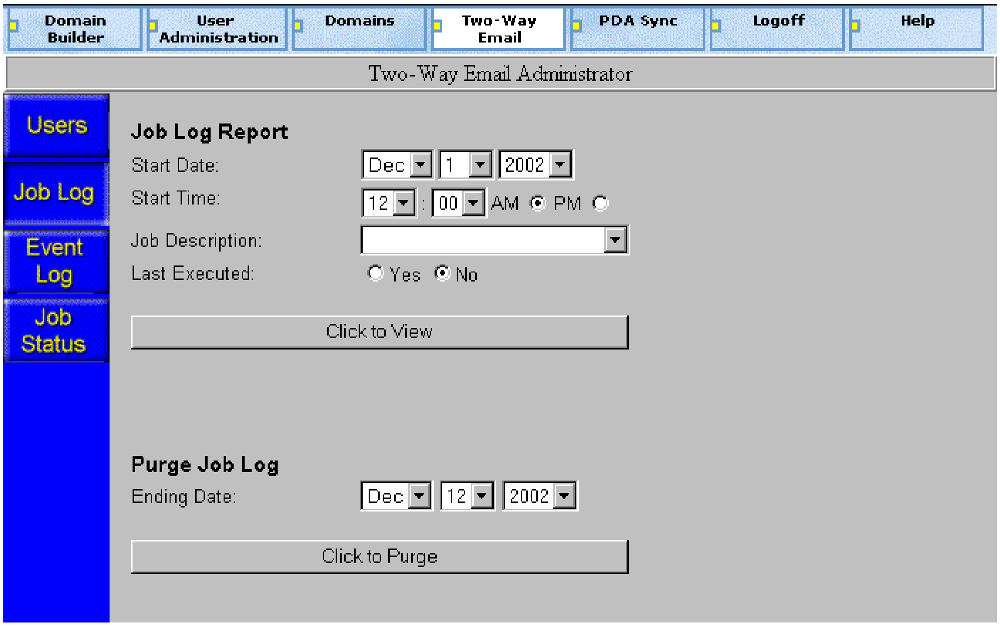
For example, to automatically purge Job Log reports every two days, enter:

```
LOG_PURGE_PERIOD 2
```

This parameter applies to the Two-Way Email Job Log and the ReportCaster Job Log. For more information, see the *WebFOCUS ReportCaster Administrator's Manual*.

Procedure How to Purge the Job Log

1. Select *Two-Way Email* on the Managed Reporting blue toolbar to access the Two-Way Email Administrator console. Click the Job Log tab on the left to display a window like the following:



2. Using the drop-down lists for Ending Date, specify a date through which the Job Log will be purged.

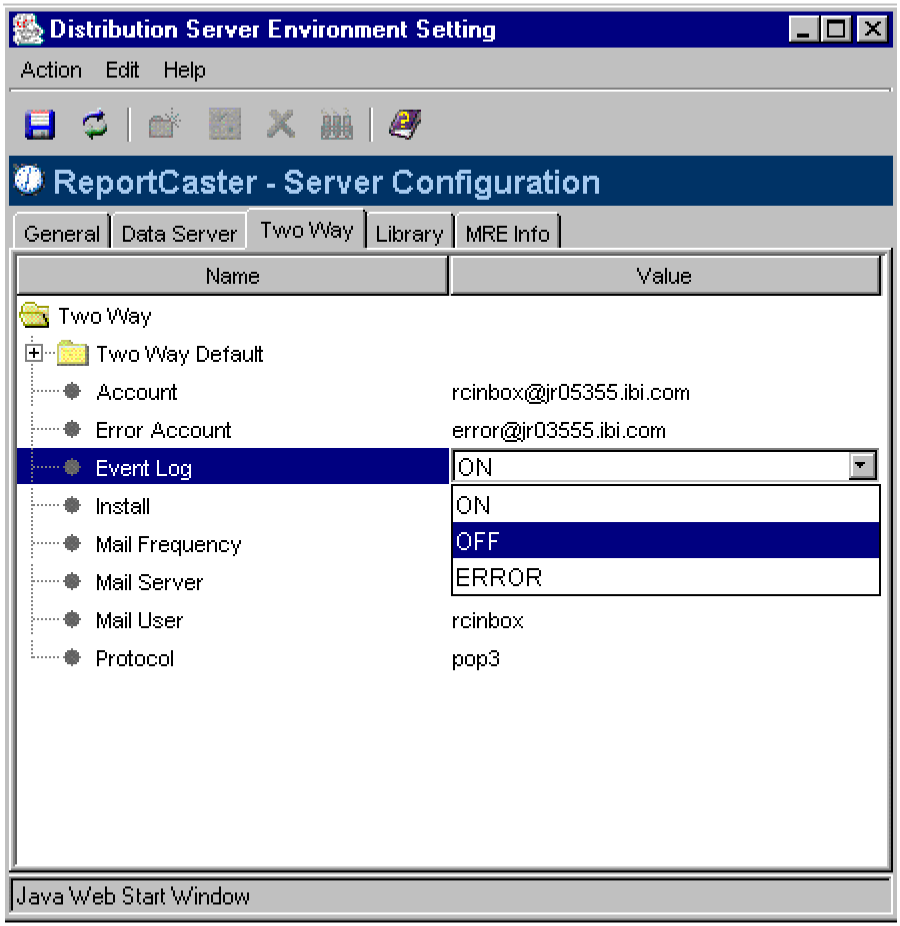
3. Click *Click to Purge*. Respond to the confirmation message on the next dialog box. Two-Way Email will delete all reports from the beginning of the Job Log through the specified ending date.

Using the Event Log

Use the Event Log to monitor the status of a Two-Way Email request as it is received, assessed for security, sent to the WebFOCUS Reporting Server for execution, and distributed as a report.

The Event Log is an HTML page that displays in a browser window.

You can customize the content of the Event Log. Edit the parameter EVENTLOG in the Two-Way Email section of the Distribution Server's file as follows.

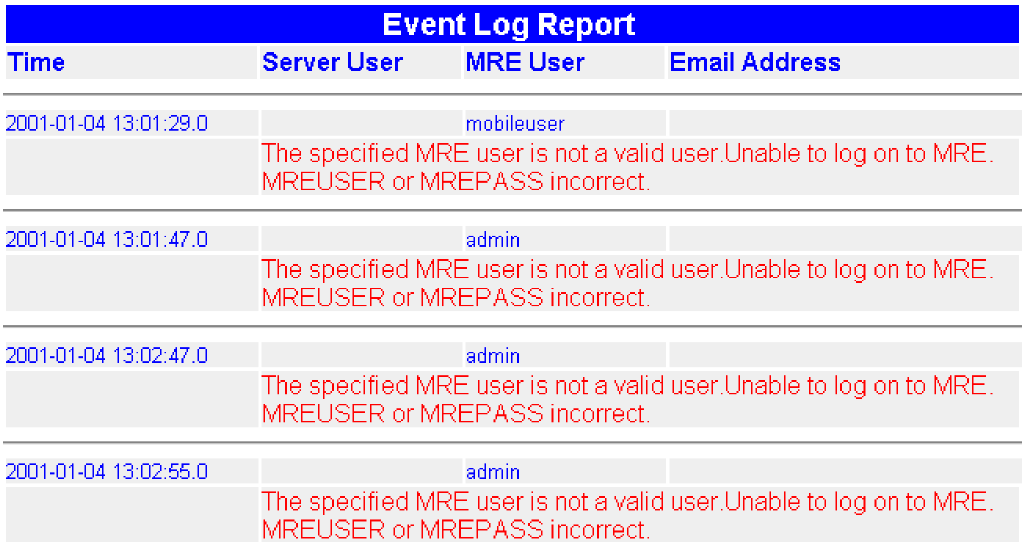


The descriptions for each setting are given as follows.

Setting	Description
OFF	Turns off the Event Log. Nothing is displayed.
ERROR	Displays only errors.
ON	Displays all events.

Monitoring E-mail Traffic

The following are sample entries from an Event Log that displays only errors.



Event Log Report

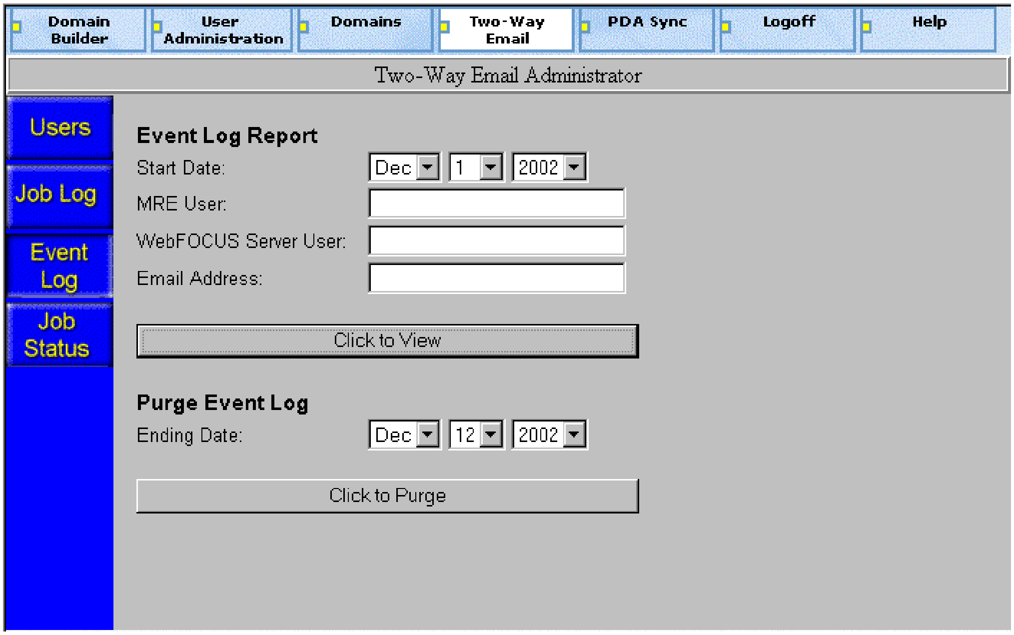
Time	Server User	MRE User	Email Address
2001-01-04 13:01:29.0		mobileuser	
	The specified MRE user is not a valid user.Unable to log on to MRE. MREUSER or MREPASS incorrect.		
2001-01-04 13:01:47.0		admin	
	The specified MRE user is not a valid user.Unable to log on to MRE. MREUSER or MREPASS incorrect.		
2001-01-04 13:02:47.0		admin	
	The specified MRE user is not a valid user.Unable to log on to MRE. MREUSER or MREPASS incorrect.		
2001-01-04 13:02:55.0		admin	
	The specified MRE user is not a valid user.Unable to log on to MRE. MREUSER or MREPASS incorrect.		

Each entry includes the following:

- **Time.** The date and time the event occurred.
- **Server User.** The WebFOCUS Reporting Server user ID.
- **Managed Reporting User.** The Managed Reporting user ID.
- **Email Address.** The user's e-mail address.
- **Message.** Description of the error that occurred.

Procedure How to Monitor E-mail Traffic

1. Select *Two-Way Email* on the Managed Reporting blue toolbar to access the Two-Way Email Administrator console. Click the Event Log tag on the left to display a window like the following:



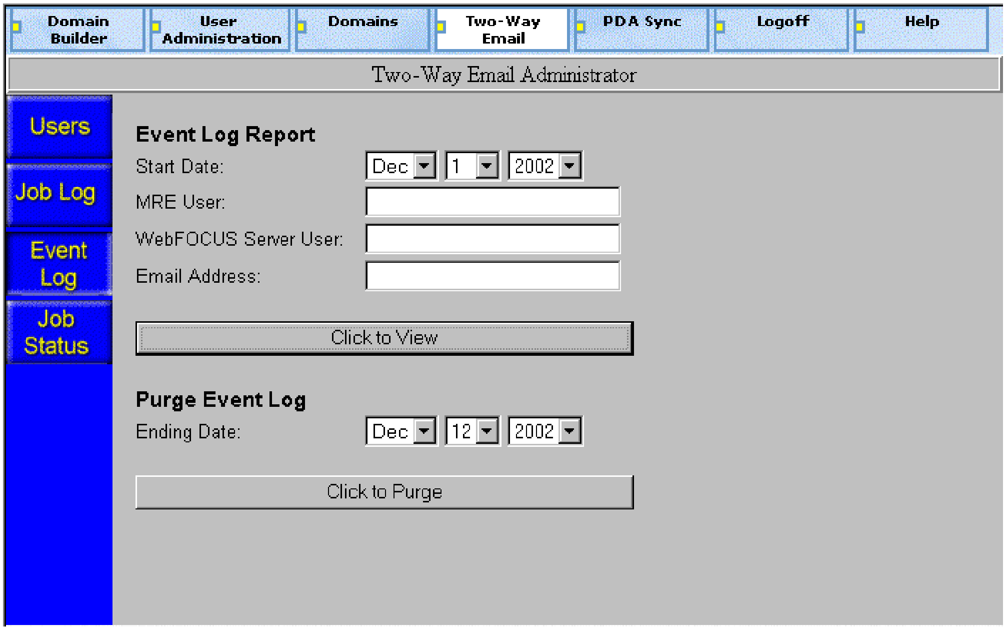
2. Apply selection criteria to define the information that will be retrieved:
   - Use the drop-down lists for Start Date to specify the beginning of the timeframe that you are interested in. Information on all events that occurred from that date up to the current date will be retrieved.
   - Enter an Managed Reporting user ID in the Managed Reporting User field. Information only for the events associated with that user ID during the specified timeframe will be retrieved.
   - Enter a WebFOCUS Reporting Server user ID in the WebFOCUS User field. Information only for the events associated with the supplied Managed Reporting user ID and WebFOCUS Reporting Server user ID during the specified timeframe will be retrieved.
   - Enter an e-mail address in the Email Address field. Information only for the events associated with the supplied IDs and address during the specified timeframe will be retrieved.
3. Click *Click to View* to display the Event Log report.

Purging the Event Log

Because the Event Log accumulates information and can become difficult to navigate, it is a good idea to periodically purge it to conserve space.

Procedure How to Purge the Event Log

1. Select *Two-Way Email* on the Managed Reporting blue toolbar to access the Two-Way Email Administrator console. Click the Event Log tab on the left to display a window like the following:



2. Using the drop-down lists for Ending Date, specify a date through which the Event Log will be purged.

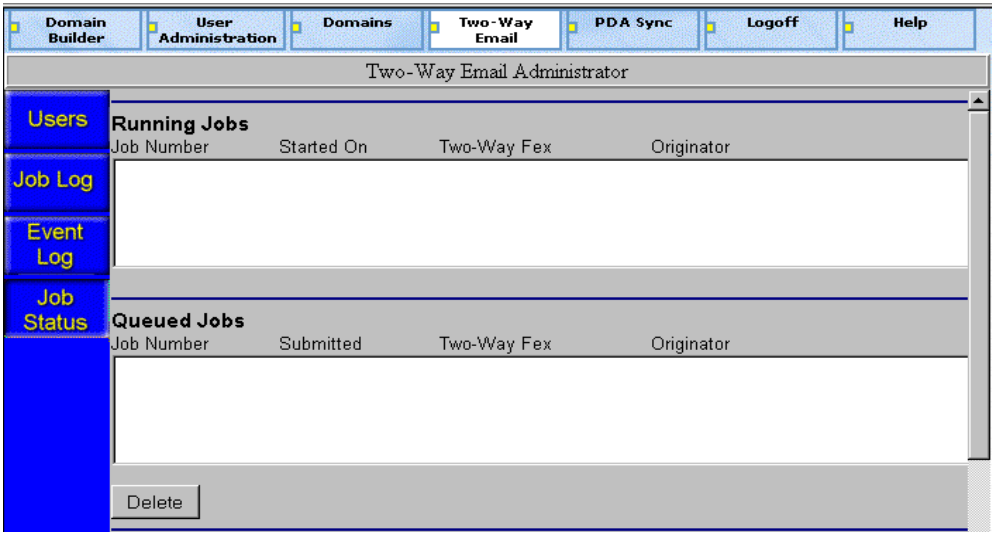
3. Click *Click to Purge*. Respond to the confirmation message on the next dialog box. Two-Way Email will delete all reports from the beginning of the Event Log through the specified ending date.

Checking the Status of a Job or Canceling a Job

You can check the status of an executing job or one that is waiting to be sent to the WebFOCUS Reporting Server for execution (a queued job). You can also cancel a queued job.

Procedure How to Check the Status of a Job

1. Select *Two-Way Email* on the Managed Reporting blue toolbar to access the Two-Way Email Administrator console. Click the Job Status tab on the left to display a scrollable window like the following:



Jobs currently running on the WebFOCUS Reporting Server are displayed at the top of the window, under Running Jobs.

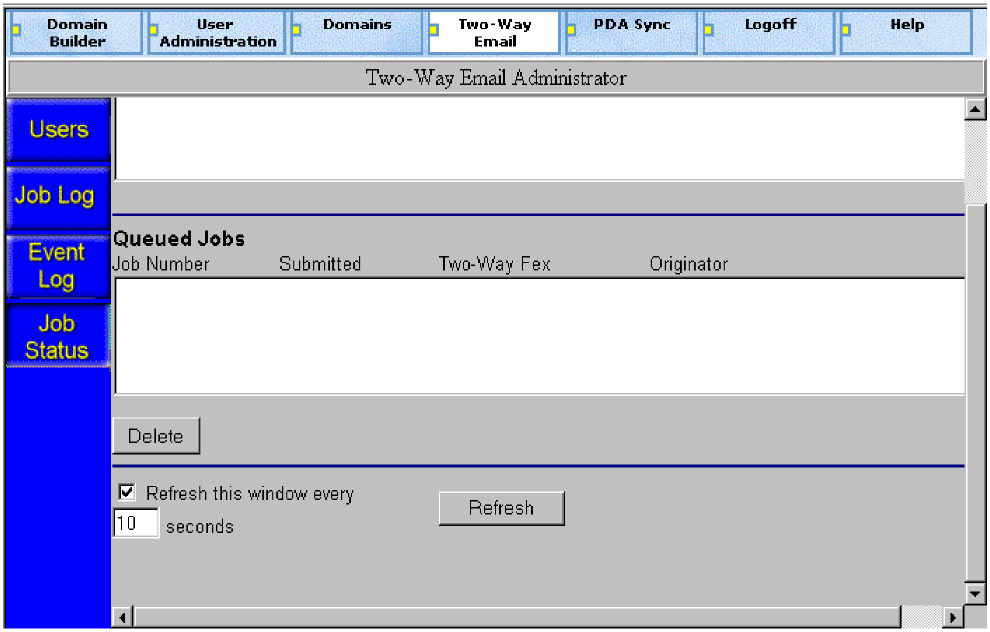
Jobs waiting to be sent to the WebFOCUS Reporting Server for execution are displayed near the bottom of the window, under Queued Jobs.

The following information identifies a job:

- **Job Number.** The unique, system-generated key for a specific execution of a report.
- **Started On (under Running Jobs).** The date and time the job started running on the WebFOCUS Reporting Server.
- **Submitted (under Queued Jobs).** The date and time the job was submitted to the WebFOCUS Reporting Server for execution.

- **Two-Way Fex.** The name of the procedure for the Managed Reporting Standard Report.
- **Originator.** The e-mail address from which the request originated.

2. The option Refresh this window every *n* seconds is checked by default, retrieving the latest information after the specified interval of time. You can accept the default interval of 10, or supply the interval in seconds. Click *Refresh* to immediately retrieve the latest information.



Procedure How to Cancel a Queued Job

1. Select *Two-Way Email* on the Managed Reporting blue toolbar to access the Two-Way Email Administrator console. Click the Job Status tab on the left.
2. Select one or more jobs from the list under Queued Jobs. Click *Delete* to cancel execution.

CHAPTER 17

ReportCaster Alerts Administration

Topics:

- What Are Alerts?
- What Can Be an Alert?
- Components of an Alert
- Two-Way Email Support
- The Alert Wizard
- Checking Alerts

WebFOCUS ReportCaster Alerts enable Managed Reporting Administrators and Domain Admins to distribute an entire report or selected sections of a report only when certain test conditions are met. The ReportCaster Alerts feature is available from WebFOCUS Managed Reporting.

What Are Alerts?

A ReportCaster Alert sends notification to a user whenever a specified event takes place within a data source. This allows the user to remain in constant communication with a data source from any location. You are able to create test conditions (rules) and specify how often you would like these rules or events to be checked against a data source. ReportCaster can then generate a report or sections of that report (burst option) as a result of the alert.

ReportCaster Alerts work with all e-mail clients, including the following mobile devices: Palm OS, Pocket PC, Blackberry, and e-mail-enabled mobile phones. Alerts can also be sent to any PC or laptop computer with e-mail capability.

ReportCaster Alerts provide the following:

- **Alert Wizard.** Allows the Administrator to quickly set up test conditions (rules) that determine if an alert should be launched. It also allows the Administrator to create the report for distribution and select distribution options for the alert.
- **Two-Way Email support.** Offers the Administrator the ability to attach a Two-Way Email template to a ReportCaster Alert, providing users with the ability to automatically respond to alerts.
- **Scheduling flexibility.** When scheduling a ReportCaster Alert, users can choose to run the alert as often as every minute to check for desired test conditions.

What Can Be an Alert?

A data driven alert is an event that is prompted by a guideline you define. This guideline can vary from simple to complex. For example, a simple guideline might be to alert a sales manager when an order is entered that exceeds $1 million. An example of a more complex guideline might be to alert a department head when cumulative expenses exceed budget for any category. The report sent to the manager as a result of the alert could show the most recent transactions, their amounts, and their sources.

Components of an Alert

The ReportCaster Alert feature requires the following components:

- **ReportCaster Repository.** The ReportCaster Repository stores schedule, distribution, and log information for alerts and report jobs.
- **WebFOCUS Reporting Server.** This server is responsible for executing the procedure and accessing and retrieving the requested data.
- **Distribution Server.** Checks for scheduled jobs to run. It extracts schedule and distribution information from the ReportCaster Repository and then submits the scheduled alert to the WebFOCUS Reporting Server for execution. When triggered, the Distribution Server distributes the alert that was scheduled with ReportCaster.
- **Managed Reporting.** This environment is used to create and manage ReportCaster Alerts.

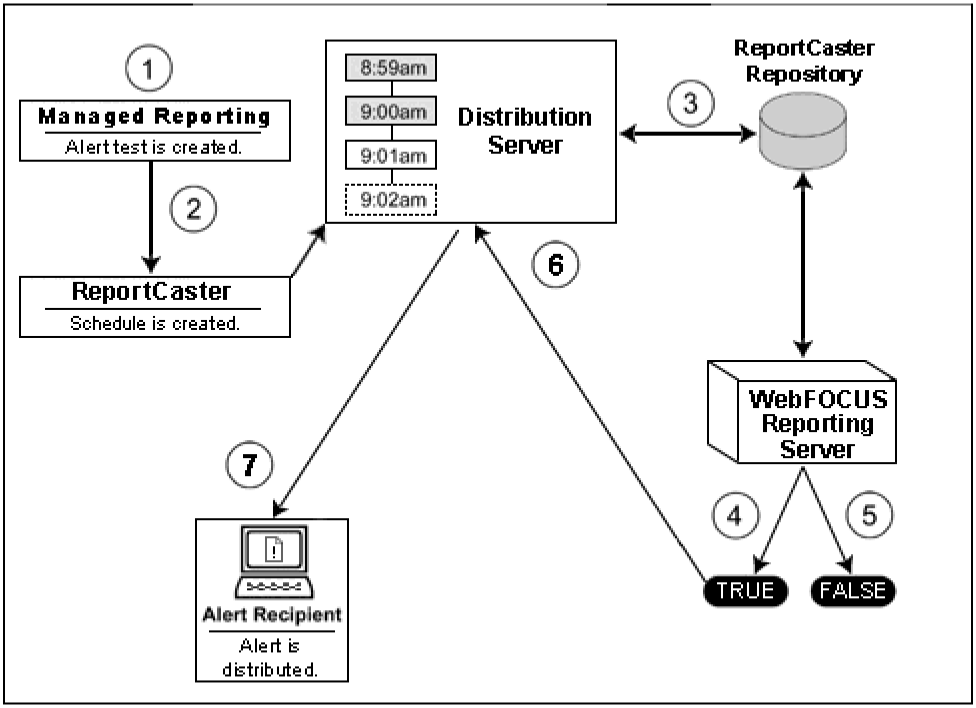
A ReportCaster Alert consists of the following:

- Alert test procedure.
- Alert event procedure.

An **alert test procedure** is required to check whether or not a set of test conditions (rules) the Administrator defines is met (true or false). If the conditions are true, an alert event procedure is executed. An **alert event procedure** specifies the report to be distributed. Once an alert is created, it is stored in the Managed Reporting Repository.

The Life of a ReportCaster Alert

The following diagram illustrates how ReportCaster Alert processing works:



1. The Managed Reporting Administrator (using the Alert Wizard) creates an alert test and designs the report to be run if the alert conditions occur.
2. An alert schedule is created using ReportCaster.
3. The ReportCaster Distribution Server checks for scheduled jobs in the ReportCaster Repository.
4. When a scheduled alert test is found, it is evaluated on the WebFOCUS Reporting Server to see if all test conditions (rules) are true.
5. If the alert test is false, the alert is re-queued for the next scheduled alert test.
6. If the alert test is true, the WebFOCUS Reporting Server runs the alert event procedure and returns the results to the Distribution Server.

7. The Distribution Server distributes the alert to the specified recipients.

   You can specify a description, run interval, and start time on the ReportCaster Scheduling tab. You can schedule the following alert schedule options:

   - **Automatically Reset.** After the alert is triggered, reactivate the alert when the condition is no longer true. The system will keep checking the condition after the alert has been triggered. As soon as the condition is no longer true, it will reactivate the alert.
   - **Continue After Alert.** After the alert has been triggered, reactivate the alert immediately.
   - **Terminate Schedule After Alert.** Deactivate the schedule after the alert is triggered. This is the default.
   - **Delay.** Restart the alert after a specified period. You can specify to restart the alert after a maximum of 99 Minute(s), Day(s), Hour(s), Week(s), Month(s), or Year(s).

   Note that a Two-Way Email template can be attached to provide alert response capability.

Two-Way Email Support

In addition to supporting the request and distribution of reports from WebFOCUS Managed Reporting using email, Two-Way Email also supports the ReportCaster Alert feature. Two-Way Email users are allowed to respond to a data-driven alert and perform further actions. For example, they can request more information about a topic, distribute reports to employees, or update a data source. Essentially, an alert response exposes users to all the functions that are offered by WebFOCUS.

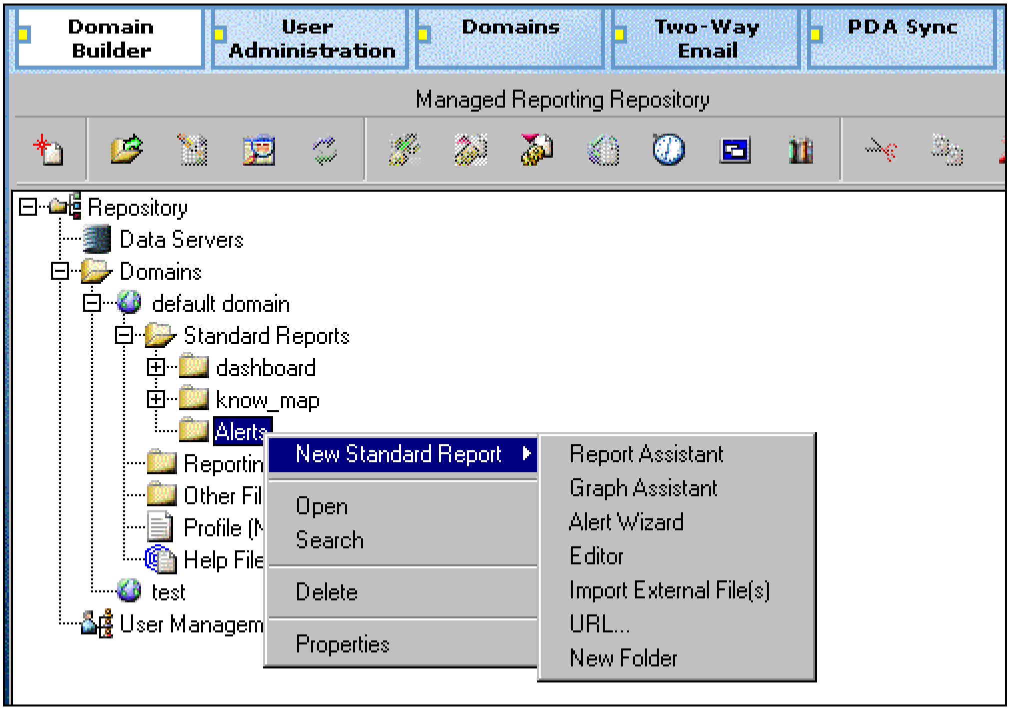
The Alert Wizard, part of Managed Reporting, contains a property that enables the Administrator to link any scheduled alert to a single Two-Way Email report.

The Alert Wizard

To facilitate the creation and scheduling of alerts in ReportCaster, the Alert Wizard guides you through a series of panels that complete the following tasks:

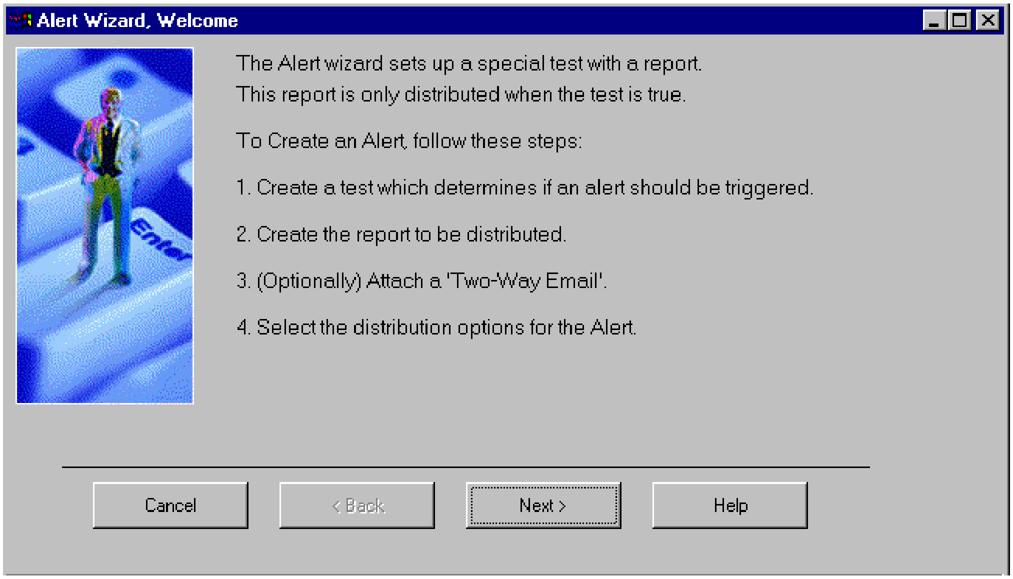
- Create an alert test.
- Create a new report to be distributed or select an existing report.
- Attach a Two-Way Email to the alert (optional).
- Schedule the alert test (or optionally choose to schedule the alert later).
- Select the distribution options for the alert.

If you are logged into Managed Reporting as a Managed Reporting Administrator or Domain Admin, you can access the Alert Wizard through the New Standard Report option shown below from a Standard Report folder or subfolder.



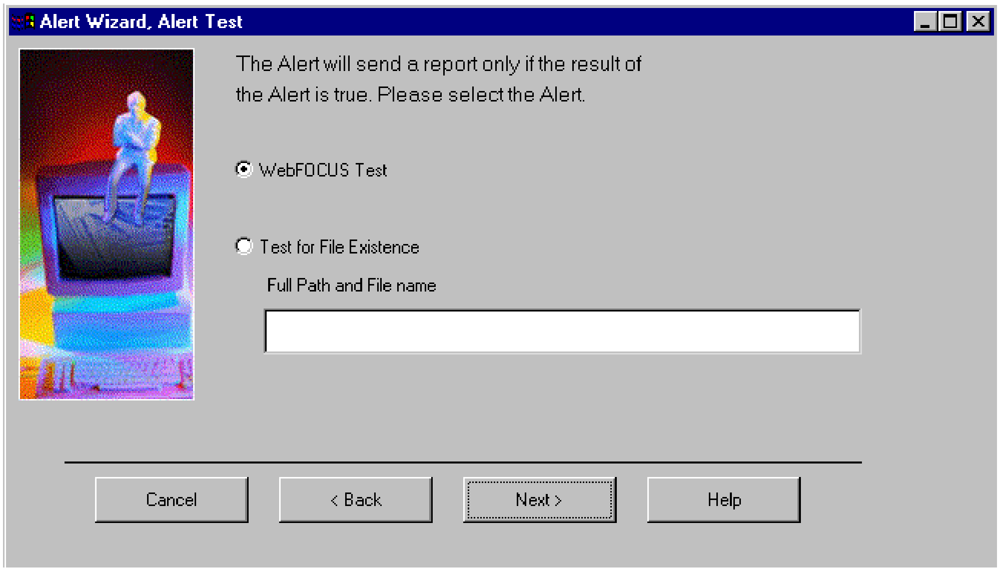
Procedure How to Create an Alert Test

1. Select *Alert Wizard* from the New Standard Report window. The Alert Wizard, Welcome panel displays:



From this panel you can create one or more tests for your alert. The alert report is distributed only if the entire test evaluates as true.

2. Click *Next*. The Alert Wizard, Alert Test panel displays:



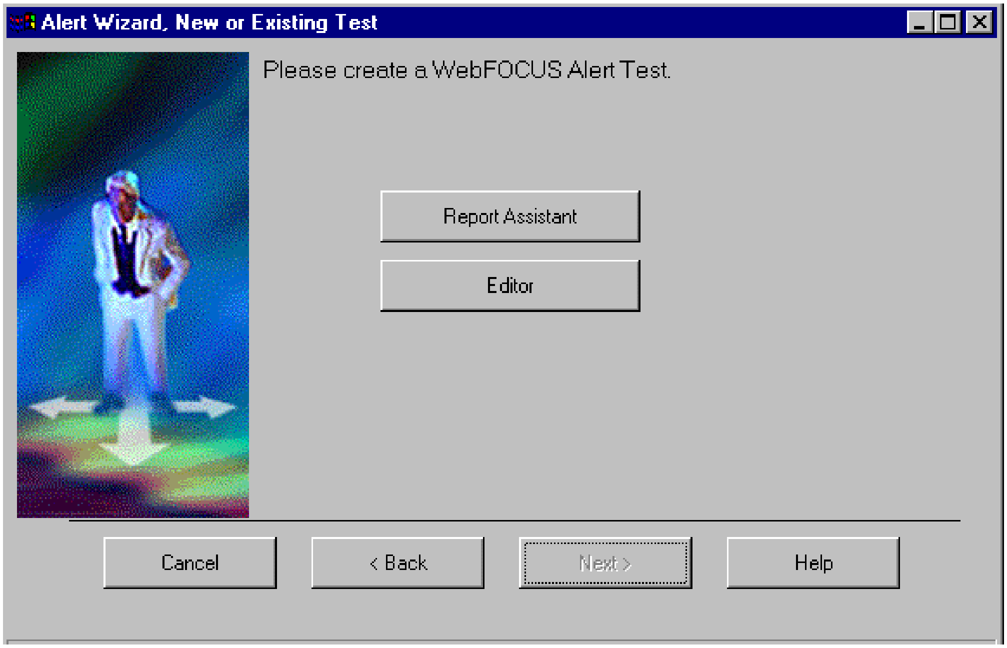
3. Select the alert test.

   a. WebFOCUS Test is the default. If you chose WebFOCUS Test, click *Next* and proceed to step 4.

   b. If you want tocheck for a file, click the *Test for File Existence* radio button.

   - Type in the full path to the file on the WebFOCUS Reporting Server that you want to check. Do not use a file name or a file path that includes spaces.
   - Click *Next*.
   - If the file is located, the alert report is sent. Proceed to step 13 to create the alert report (event procedure).

The Alert Wizard, New or Existing Test panel opens:

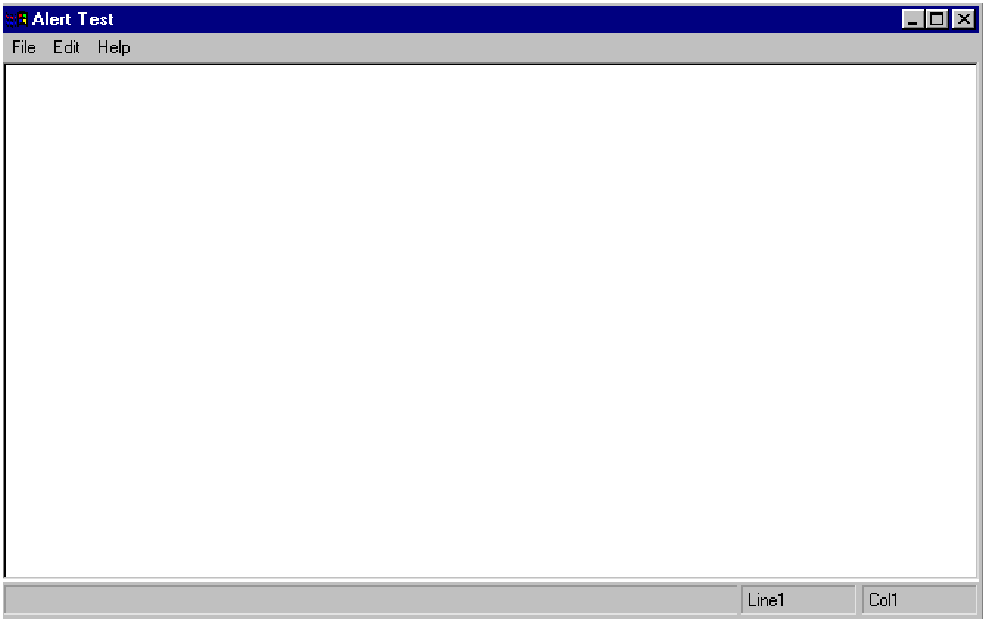


4. Select either *Report Assistant* or *Editor* to create an alert test.
   - If you chose Report Assistant, proceed to step 5 (recommended).
   - If you chose Editor, proceed to step 10.
5. The WebFOCUS Masters List window appears. Select a database description and click *OK*. The WebFOCUS Report Assistant opens to assist you in creating selection criteria for your alert test. For more information on the WebFOCUS Report Assistant, see the *WebFOCUS Managed Reporting End User's Manual*.
6. Choose your options in the Report Assistant and click *Quit*. (Do not use amper variables with unknown values in a WHERE condition in Report Assistant when creating an alert test. Since alerts run unattended, they will not have the ability to collect the value from a user.)
7. When you have finished your alert test, click *Quit*. The Quit Save Changes panel appears.
8. Click *Yes* to save your changes. You will be returned to the Alert Wizard, New or Existing Test panel.

9. Click *Next*.

- If you have just created an alert test, proceed to step 13.
- If you have just created an alert event, proceed to step 17.

10. If you chose Editor in step 5, the alert test Editor panel displays:



11. Type your alert test and select *Exit* from the File menu. The Editor Save Changes panel appears.

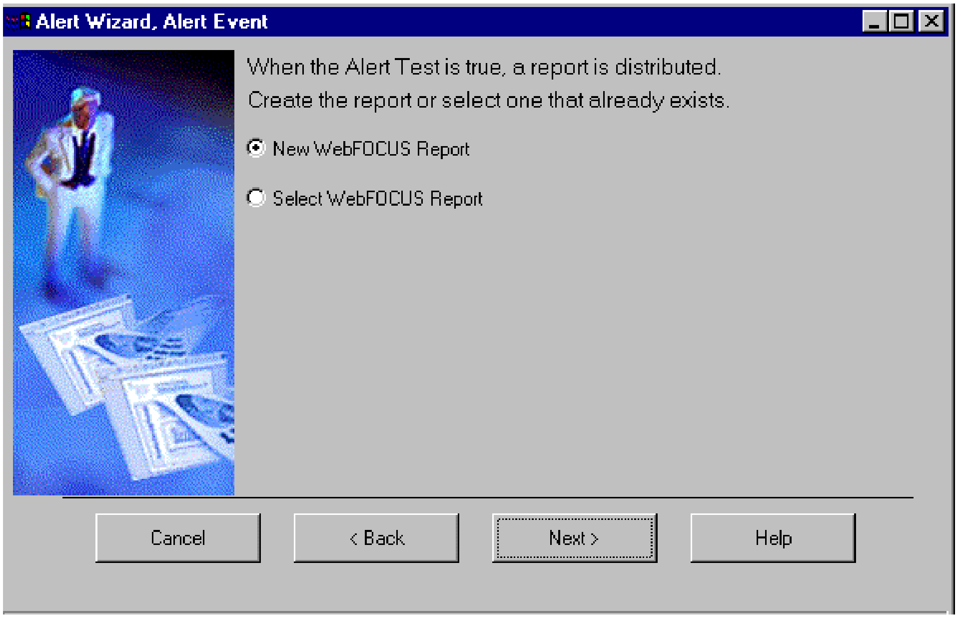
Caution:

- If you are creating an **alert test** with the Editor and you specify a parameter (&variable), you must create the **alert event** with the Editor.
- If you use the Editor, you can no longer use Report Assistant. Information Builders recommends using Report Assistant to create the alert test and the alert event.
- You must include an ON TABLE HOLD statement in your alert test.

12. Click *Yes* to save your alert test. You will be returned to the Alert Wizard, New or Existing Test panel. Click *Next*.

13. The Alert Wizard, Alert Event panel appears. You can indicate which report to distribute when the alert test is true. It can be a report you create or one that already exists.

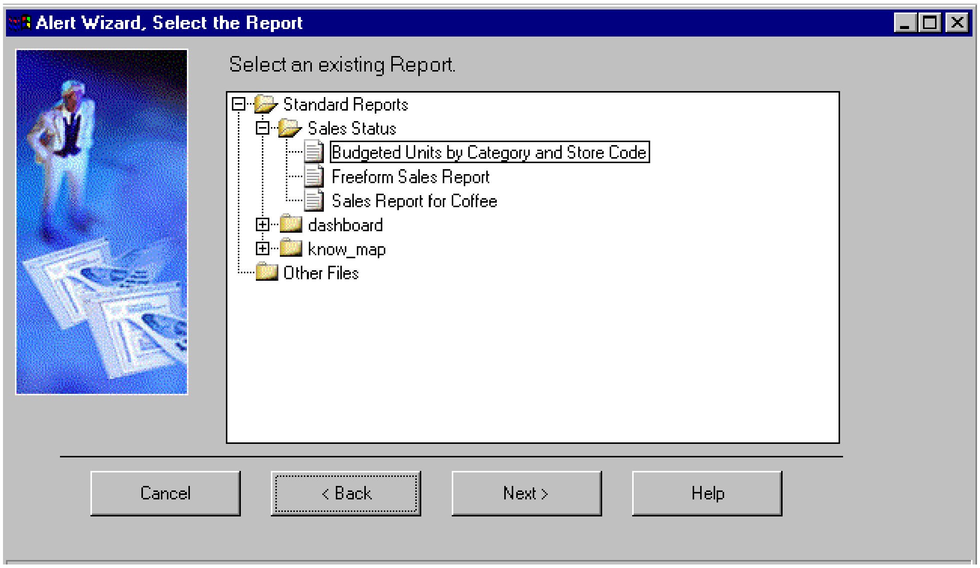
- If you choose New WebFOCUS Report, click *Next* and proceed to step 14.
- If you choose Select WebFOCUS Report, click *Next* and proceed to step 15.



14. The Alert Wizard, Create the Report panel displays. Create a new report with the Report Assistant or Editor. Click *Next* and proceed to step 17.

Note: If you select Editor the Report Assistant will become disabled

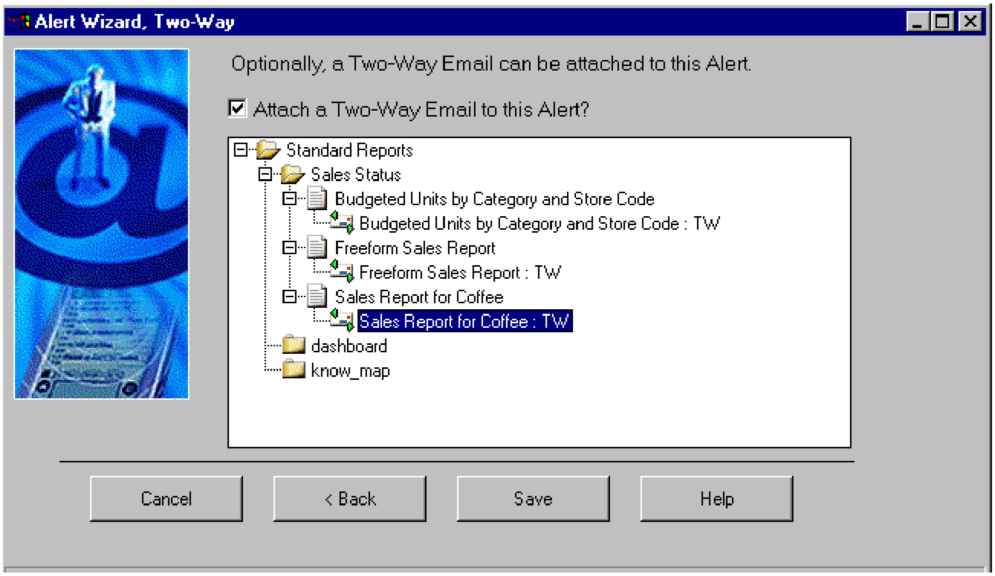
15. The Alert Wizard, Select the Report panel appears:



16. Select your report from the Standard Reports folder and click *Next*.

17. You can now optionally attach a Two-Way Email to the alert if your server is licensed for Two-Way Email and has Two-Way Email templates. You select Attach a Two-Way Email to this alert for an optional Two-Way Email to be attached to the alert. (The check box is unchecked by default.)

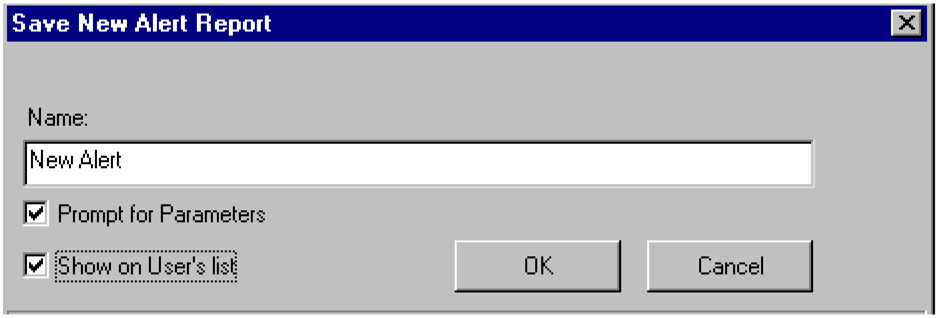
If you chose Attach a Two-Way Email to this Alert, a tree of reports available to Two-Way Email displays. This tree consists of only Standard Reports that have Two-Way Email templates. If a Standard Report does not have any Two-Way Email templates attached, it will not be listed.



Note: If the *Attach a Two-Way by Email to this Alert* check box is checked, the Save button will be disabled until a report has been chosen.

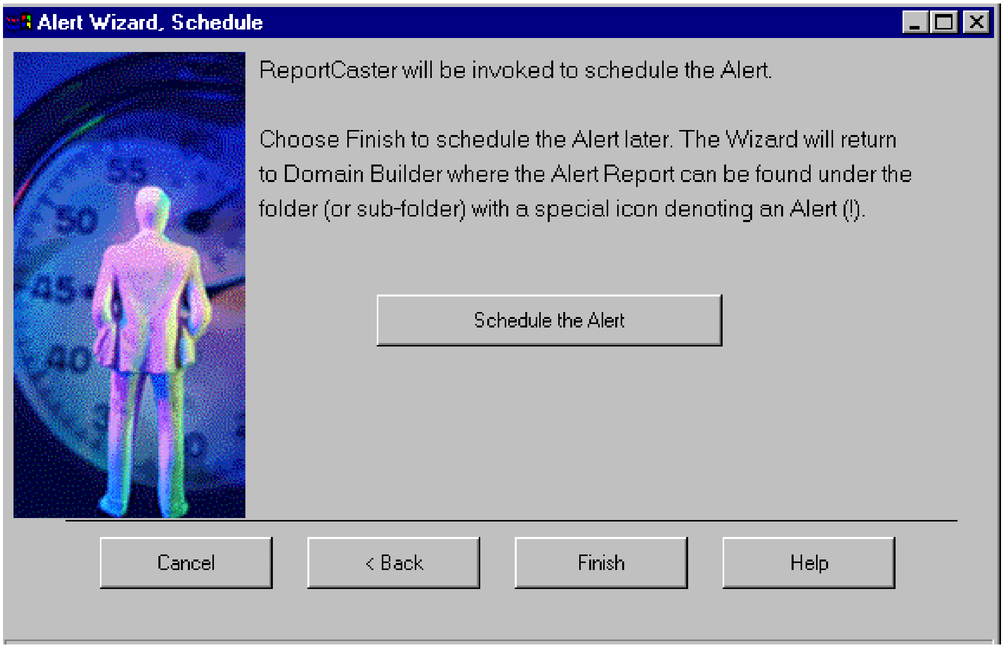
For more information on Two-Way Email, see Chapter 16, *Two-Way Email Administration*.

18. Select a New Alert Report and click *OK*. The Save New AlertReport panel appears:

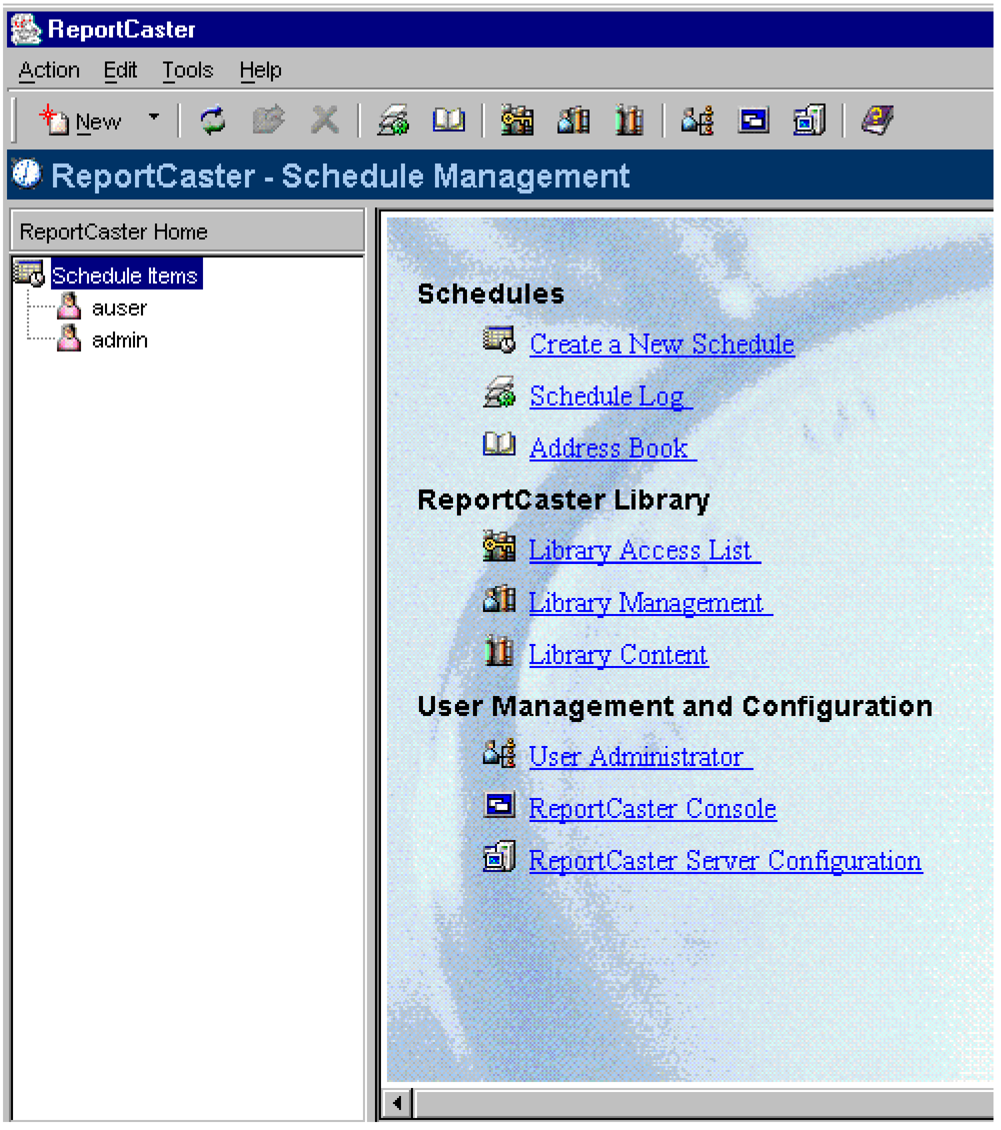


19. Type the name for the alert and, if applicable, check the Prompt for Parameters or Show on User's list check boxes.

20. Click *OK*. The Alert Wizard, Schedule panel appears:

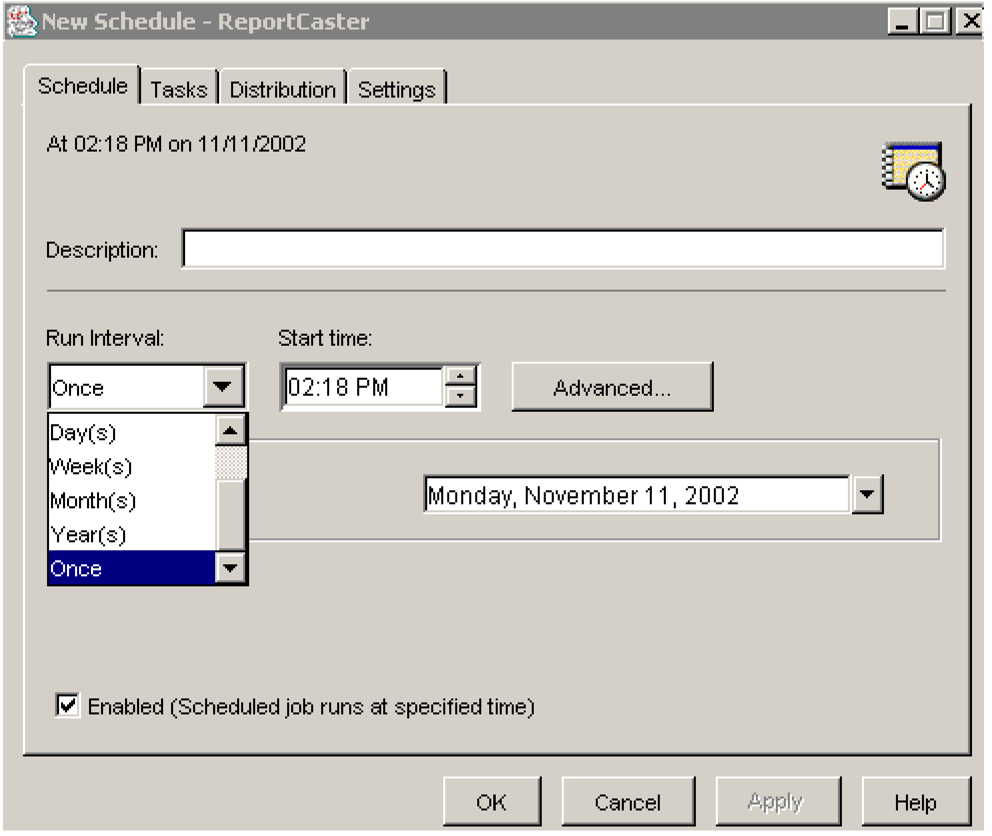


21. Click *Schedule the Alert* to invoke ReportCaster to schedule the alert. The ReportCaster Development and Administration Interface will be invoked.



Note: If you prefer to schedule the alert at a later date, click *Finish* instead of Schedule the Alert. When Finish is selected, you are returned to the Domain Builder. You will see your alert report under the folder (or subfolder) with a special icon (!) denoting an alert (as distinguished from a Standard Report).

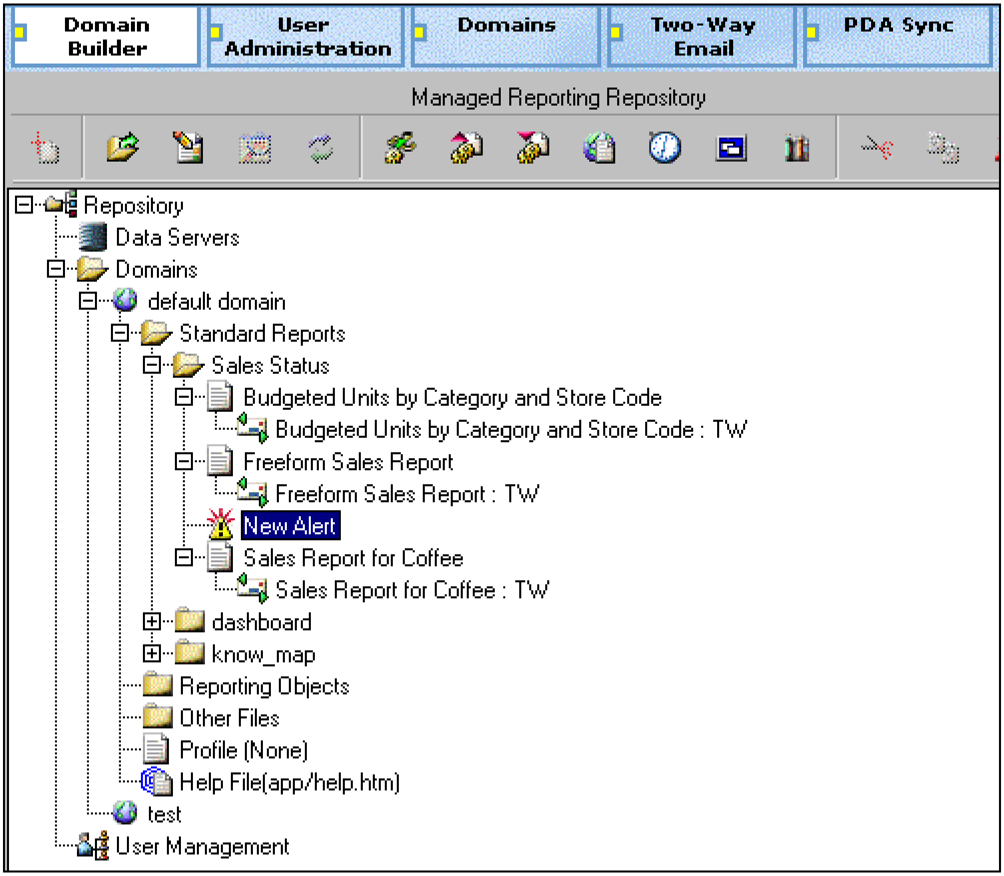
22. When the Development and Administration User Interface is invoked, click the Create a New Schedule link. The New Schedule-ReportCaster window opens.



Tip: To schedule an alert, you must create a Task. Since an alert is a Standard Report, you must select the Standard Report Task Type when creating an alert schedule. For more information, see the *ReportCaster Development and Administration Manual*.

23. Exit ReportCaster and click *Finish*.

The alert report displays in the Domain Builder of Managed Reporting.



Checking Alerts

When an alert test is false (and therefore not activated), nothing gets written to the log file. Information about an activated alert is written to the log file. When an error occurs during the execution of a scheduled alert, a message displays.

In order to track the completion of a scheduled alert, or errors that occurred during execution without checking the log file, we recommend that you utilize the Notification option in ReportCaster.

In the Schedule Directory Applet, the Notification tab allows you to specify:

- The terms for supplying notification (Never, Always, or On Error (default)).
- The level of detail in the notification (full notification or brief notification).
- The e-mail address that should receive the notification message.

CHAPTER 18

Enhancing Metadata

Topics:

- Working With Metadata
- Creating OLAP-enabled Metadata
- Caching Metadata
- Creating Descriptive Information About Your Data
- Viewing Descriptive Information

Before you can create Standard Reports and Reporting Objects that access a data source (relational, hierarchical, or multidimensional), you must have access to the metadata for that data source. Metadata is information about the structure of the data itself, such as the columns or fields in the data source, their format, or the location of the data sources.

In WebFOCUS, metadata is contained in a Master File and, if required, an Access File.

- Master Files contain metadata information about the segments in the data source and the fields that make up each segment. Master Files represent the structure of a data source, by showing how segments relate to one another and by listing the fields in each segment along with their data types and formats.
- Access Files contain information used to locate the data source, such as file names and server names.

Working With Metadata

These procedures describe how to edit and delete metadata in Domain Builder.

Procedure How to Edit Metadata

1. Select the Data Server component in Domain Builder.
2. Select the Reporting Server you want to use, and then select Applications and the specific application you want to use.
3. Select the Data folder under your application and the specific Master File you want to edit.
4. Click *Edit Source*. The Text Editor window opens.

   Make your changes to the file, save the changed file, and close the Text Editor window. You return to Domain Builder.

Note: Syntax and error checking are not performed until the metadata is accessed.

Procedure How to Delete Metadata

1. Select the Data Server component in Domain Builder.
2. Select the Reporting Server you want to use, and then select Applications and the specific application you want to use.
3. Select the Data folder under your application and the specific Master File you want to delete.
4. Click *Delete*. A pop-up window prompts you to confirm that you want to delete the Master File.
5. Click *OK*.

Creating OLAP-enabled Metadata

You can edit existing metadata to provide Online Analytical Processing (OLAP) capabilities. OLAP-enabled metadata allows users to view and interact with data in a WebFOCUS Repository in order to make critical business decisions. Users can drill down or roll up hierarchical data, pivot fields from columns to rows (or vice versa), and slice-and-dice information by filtering or querying data sources based on specified criteria or thresholds. OLAP is specifically designed for highly iterative, multi-dimensional viewing of data and is not confined to the limitations of two-dimensional reports.

After OLAP-enabling metadata, you must turn on OLAP in any Standard Report or Reporting Object so that users can use the OLAP selections panel or OLAP Control Panel to manipulate data.

Caching Metadata

When a user opens Report Assistant, Graph Assistant, or the Join Tool and selects an item from a table list (such as a Master File), a request is issued to the WebFOCUS Reporting Server to obtain metadata. During the course of a typical WebFOCUS session, a user may access the field list or table list several times.

The cached metadata feature improves performance by temporarily storing (caching) metadata at initial download instead of querying the server at each request. Metadata caching is available in the Domain Builder and Domains environments for all categories of users except HTML users.

Enabling Metadata Caching

To enable metadata caching, two applet parameters in the HTML calling page need to be added and set:

```
<PARAM NAME = fexcachesize value = "32">
<PARAM NAME = fexcachetime value = "1800">
```

Fexcachesize is the number of items that are set aside for cache purposes. For example, a list of fields for the CAR file is an item as defined in fexcachesize. Fexcachetime is the amount of time in seconds. Thirty minutes is the default setting (30 X 60 =1800).

Both of these values can be set to on or off or to any integer value. There is no absolute limit for fexcachesize or fexcachetime. The amount of cache available is limited by your desktop's available memory. Both fexcachesize and fexcachetime can be set to any integer value you desire. Setting an integer value to 0 will turn caching off. A large value for fexcachesize can slow browser performance, since the browser requires more time to parse the cache items. The default for metadata caching is on.

Customizing Metadata Caching

In order to customize metadata caching, you must change two applet parameters in the HTML calling page for the view you are using. The calling pages for the various WebFOCUS views reside in the following files in your Web server's /ibi_html directory:

View	Calling Page
Managed Reporting Administrator, Domain Admin, and Java User	mr_ie.htm

For more information on customizing user interfaces, see the *Developing Reporting Applications* manual.

Procedure How to Customize Your Metadata Cache

1. Identify the appropriate calling page and open it with an editor such as Notepad.
2. Use your editor's search facility to find the string PARAM NAME.
3. Add the following lines as new entries following the existing PARAM NAME entries:

```
<PARAM NAME = fexcachesize value = "32">
<PARAM NAME = fexcachetime value = "1800">
```

4. Save the calling page.

Clearing the Cache

To clear the metadata cache you can either:

- Click the reload domain button on the gray toolbar.
- Switch from one tool to another. For example, switch from Domain Builder to the Domains view.

Creating Descriptive Information About Your Data

To mine the data in your corporate data sources, your user community needs information about the meaning of the data in these data sources. For example, a user might want to know what kind of information a particular data source contains, how frequently it is updated, what the fields represent, or how the field values are derived. Short data source names and field names do not afford the level of description users require in order to identify and manipulate the data they need to solve business problems.

WebFOCUS provides a set of features that:

- Give you the opportunity to describe your data in terms that are meaningful to your users. You can provide:

  Brief descriptions (up to 78 characters) of a data source or the fields it contains. For more information, see *Creating Brief Descriptions* on page 18-5.

  Detailed descriptions (up to 255 characters) of a data source, fields within a data source, or specific field values. For more information, see *Creating Detailed Descriptions* on page 18-5.

- Deliver those descriptions precisely at the point where the need for such information arises: in the graphical tools—Report Assistant, Graph Assistant, or Join Tool—that your users employ to access the data. For more information, see *Viewing Descriptive Information* on page 18-17.

Creating Brief Descriptions

You can provide up to 78 characters of information about a data source or the fields it contains in the Master File that describes the data source.

Use the ...	To provide information about ...
REMARKS attribute	The entire data source. For example, you might specify the update frequency—hourly, daily, weekly—of this particular data source. This description will appear in the Tables List window under the second column, titled Remarks.
DESCRIPTION attribute	Individual fields within the data source. For example, you might specify how a particular field is calculated. This description will appear in the Fields List window under a column titled Remarks.

Note: You cannot include descriptions for field values in the Master File. You provide these descriptions in a description table. For more information, see *Creating Detailed Descriptions* on page 18-5.

Tip: You can also include descriptive information as a comment following the $ symbol at the end of any of the file or field declarations in the Master File. These descriptions, however, are useful only for those who view the actual Master Files. Descriptions in comments are *not* delivered to your users in the Tables or Fields List windows.

For more information on creating descriptions, see the *Describing Data With WebFOCUS Language* manual.

Creating Detailed Descriptions

You can provide up to 255 characters of information about a data source, fields within a data source, or specific field values in description tables. The description table can be a relational table or a FOCUS data source.

Procedure How to Provide Information in Description Tables

1. Create the description tables. For more information, see *Creating the Description Tables* on page 18-6.
2. Link your description tables to the tables that populate the List windows. For more information, see *DBA and DBAFILE Support* on page 18-9.
3. Point to the procedures you create in Step 2 from the graphical tools' calling pages. For more information, see *Pointing to Your Procedures From the Tools' Calling Pages* on page 18-14.

Creating the Description Tables

In order for the graphical tools to pick up the information you want to display to your users, your description table must minimally provide the:

- Name of the data source, field, or field value you are describing. This name will be used to provide the link between the tables that populate the list windows and the descriptive text you are providing in your description table.
- Detailed description (up to 255 characters). Your users will be able to display this information by clicking the Description button or the Values button in the graphical tools. These no longer exist but you can click View in the Fields list and then click Description.

Your description tables must reside in a directory that is in your WebFOCUS Reporting Server's Cataloged Path. You can use tables originally designed for other purposes, or you can include other information that you might need for other purposes, as long as the above minimum information is provided.

Example Creating Descriptions for the Gotham Grinds Sample Data Sources

The following Master File describes a FOCUS data source, called GGSOURCE, which provides descriptions for some of the Gotham Grinds sample data sources.

```
FILE=GGSOURCE, SUFFIX=FOC,
 REMARKS=Provides descriptions for Gotham Grinds data sources,$
  SEGNAME=SRCDESC,$
   FIELD=DBNAME,,A64,FIELDTYPE=I,
     DESC=Names the data source being described,$
   FIELD=REMARKS,,A78,DESC=Provides short description of data source,$
   FIELD=DESCRIPTION,,A255,DESC=Provides long description of data
source,$
```

The description table contains the following fields:

Names	Descriptions
DBNAME	Is the name of the data source being described. This name will be used in the next step to link the WebFOCUS system table, SYSTABLE, which populates the Tables List window, to the descriptive text in the next two fields.
REMARKS	Is a brief description of the data source. This description will appear in the Tables List window under the second column, titled Remarks. Note that this field is not required in the description table. You can include a brief description (up to 78 characters) directly in the Master File. The field is included here to suggest the flexibility you have in creating your description tables. For more information, see *Creating Brief Descriptions* on page 18-5.
DESCRIPTION	Is a detailed description of the data source. Your users will be able to display this information by clicking the Description button at the bottom of the Tables List window.This no longer exists but you can click View in the Fields list and then click Description.

Example Creating Descriptions for Sample Gotham Grinds Fields

The following Master File describes a FOCUS data source, called GGFIELDS, which provides descriptions for some of the fields in the Gotham Grinds sample data sources.

```
FILE=GGFIELDS, SUFFIX=FOC,
 REMARKS=Provides descriptions for fields in Gotham Grinds data sources,$
  SEGNAME=FLDDESC,$
   FIELD=DBFLD,,A130,FIELDTYPE=I,
    DESC=Concatenates the name of the data source and the name of field,$
   FIELD=REMARKS,,A78,DESC=Provides short description of data source,$
   FIELD=DESCRIPTION,,A255,DESC=Provides long description of field,$
```

The description table contains the following fields:

Names	Descriptions
DBFLD	Is a concatenated name comprising the name of the data source and the name of the field being described. This concatenated name serves to distinguish similarly named fields in different data sources. This name will be used in the next step to link the WebFOCUS system table, SYSCOLUM, which populates the Fields List window, to the descriptive text in the next field.
REMARKS	Is a brief description of the data source. This description will appear in the Tables List window under the second column, titled Remarks. Note that this field is not required in the description table. You can include a brief description (up to 78 characters) directly in the Master File. The field is included here to suggest the flexibility you have in creating your description tables. For more information, see *Creating Brief Descriptions* on page 18-5.
DESCRIPTION	Is a detailed description of the field. Your users will be able to display this information by clicking the *Description* button at the bottom of the Fields List window. This no longer exists but you can click View in the Fields list and then click Description.

Example Creating Descriptions for Sample Gotham Grinds Field Values

The following Master File describes a FOCUS data source, called GGVALUES, which provides descriptions for the values of some of the fields in the Gotham Grinds sample data sources.

```
FILE=GGVALUES, SUFFIX=FOC,
 REMARKS=Provides descriptions of field values in Gotham Grinds data
         sources,$
  SEGNAME=VALDESC,$
   FIELD=FLDVALUE,,A11,FIELDTYPE=I,DESC=Names the value being described,$
   FIELD=DESCRIPTION,,A255,DESC=Provides long description of field
value,$
```

The description table contains the following fields:

Names	Descriptions
FLDVALUE	Is the field value being described. This name will be used in the next step to link the data source against which you are reporting to the descriptive text in the last field.
DESCRIPTION	Is a detailed description of the field value. Your users will be able to display this information by clicking the Values button in the Expression Builder dialog box.This no longer exist but you can click View in the Fields list and then click Description.

DBA and DBAFILE Support

The WebFOCUS tools (Report Assistant, Graph Assistant, and JOIN tool components now support DBA files and structures containing DBA. For more information on DBA rules, syntax, and examples, see the *Describing Data With WebFOCUS Language* manual. For more information on DBA security for joined data structures, see the *Creating Reports With WebFOCUS Language* manual.

Linking Your Descriptions to the List Windows

The Tables List window and the Fields List window receive their information from two system tables, SYSTABLE and SYSCOLUM, respectively. You will need to link your data source description table and your field's description table to these system tables in the procedures that populate these List windows.

Tip: The Master Files that describe the system tables, SYSTABLE and SYSCOLUM, reside in your WebFOCUS Reporting Server's catalog subdirectory, that is located under the installation directory as defined by the EDAHOME variable . You should familiarize yourself with these system tables before you link your description tables to them.

The Values List window receives its information from the actual data source against which you are reporting. You will need to link your values description table to your data source and then create a procedure to populate this List window.

Tip: Using the following FOCUS variables, your procedure can receive values for required / parameters dynamically.

Name	Descriptions
&TBNAME	Contains the name of the data source against which the current report is being run.
&FIELD	Contains the values of the field that the user selected in the graphical tool.

Once your description tables are linked, you can name your description fields among the fields retrieved for display in the List windows. Your procedures must reside in a directory that is in your WebFOCUS Reporting Server's Cataloged Path.

Note: The procedures that populate the List windows are basic FOCUS reports. The syntax shown here is the same as for any FOCUS report and is repeated only for your convenience.

Syntax How to Link Your Description Tables to the System Tables or Data Source

For data source descriptions, issue:

```
JOIN NAME IN SYSTABLE TO name_fld IN description_table [AS join_name]
```

For field descriptions, issue:

```
JOIN NAME IN SYSCOLUM TO name_fld IN description_table [AS join_name]
```

For field value descriptions, issue:

```
JOIN &FIELD IN &TBNAME TO &FIELD IN description_table [AS join_name]
```

where:

`SYSTABLE`

Is the system table that populates the Tables List window.

`name_fld`

Is the name of the field that names the data source or field being described.

`description_table`

Is the name of your description file. Your description tables must reside in a directory that is on your WebFOCUS Reporting Server's Cataloged Path.

Note: Certain database management systems require specific access commands in the WebFOCUS Reporting Server's global profile, edasprof.prf. Be sure to follow the rules that correspond to the format of your description table. For more information, see the *iWay Server Administration* manual.

`join_name`

Is the name of the joined structure. This name is used to clear a specific join.

If you do not supply a name, FOCUS automatically assigns a name that begins with the letter J followed by a sequential number. For example, the first unnamed join structure created in a FOCUS session receives the name J1, the second J2, and so on.

`SYSCOLUM`

Is the system table that populates the Fields List window.

`&FIELD`

Is a variable that dynamically receives the values of the field that the user selected in the graphical tools.

`&TBNAME`

Is a variable that dynamically receives the name of the data source against which you are reporting.

For the complete syntax of the JOIN command, see the *Creating Reports With WebFOCUS Language* manual.

Example Linking GGSOURCE to SYSTABLE

The following annotated example shows the procedure that retrieves information for the Tables List window. This sample procedure links the description table, GGSOURCE, to SYSTABLE. The procedure retrieves brief and detailed descriptions, respectively, from the REMARKS and DESCRIPTION fields in the GGSOURCE description table.

```
    SET LINES=10000
    SET PAGE=NOPAGE
    SQL FMI SET FILECASE UPPER

1.  JOIN NAME IN SYSTABLE TO DBNAME IN GGSOURCE AS J1

2.  TABLE FILE SYSTABLE
    PRINT REMARKS AS ''
3.        DESCRIPTION AS ''
    BY NAME AS ''
    ON TABLE &HOLDTYPE FORMAT XML
    END
```

1. The JOIN command links the field, NAME, in the system table to the field, DBNAME, in your description table. The List window can now access the brief and detailed descriptions in your description table.

2. The Tables List window lists your data sources in the first column. The second column, titled Remarks, displays the contents of the field REMARKS from your Master File. If you want to use the REMARKS field from the description table, use PRINT *segmentname*.REMARKS (for example, PRINT SRCDESC.REMARKS) to point to the REMARKS field in your description table.

3. When the user highlights the name of a data source for which you have provided information in your description table, the Description button at the bottom of the Tables List window will become active. Clicking the Description button displays the contents of the DESCRIPTION field in a separate Description window.No longer exists.

Note: REMARKS and DESCRIPTION are keywords and must be present in the procedure.

Example Linking GGFIELDS to SYSCOLUM

The following annotated example shows the procedure that retrieves information for the Fields List window. This sample procedure links the description table, GGFIELDS, to SYSCOLUM. The procedure retrieves brief field descriptions from the Master Files and detailed field descriptions from the DESCRIPTION field in the GGFIELDS description table.

```
    SET LINES=10000
    SET PAGE=NOPAGE
    SQL FMI SET FILECASE UPPER

1.  JOIN TBFLD WITH NAME IN SYSCOLUM TO DBFLD IN GGFIELDS AS J1
2.  DEFINE FILE SYSCOLUM
    TBFLD/A130=TBNAME|NAME;
    END
    TABLE FILE SYSCOLUM
    PRINT NAME AS ''
          ALIAS AS ''
          COLTYPE AS ''
          LEN AS ''
          SCALE AS ''
3.        REMARKS AS ''
          USAGE AS ''
          TITLE AS ''
4.        DESCRIPTION AS ''
    IF TBNAME EQ '&TBNAMEU' OR '&TBNAMEL'
    ON TABLE &HOLDTYPE FORMAT XML
    END
```

1. The JOIN command links TBFLD in the system table to DBFLD in your description table. TBFLD is a virtual field, which will be created in the next block of code.

2. The DEFINE command creates a virtual field called TBFLD, from the values in SYSCOLUM, by appending the name of the data source to the name of the field. The concatenated name serves to distinguish similarly named fields in different data sources.

3. The column titled Remarks displays the brief field description provided using the DESCRIPTION attribute in the Master File. If you want to use the REMARKS field from the description table, use PRINT *segmentname*.REMARKS (for example, PRINT SRCDESC.REMARKS) to point to the REMARKS field in your description table.

4. When the user highlights the name of a field for which you have provided information in your description table, the Description button at the bottom of the Fields List window will become active. Clicking the *Description* button displays the contents of the DESCRIPTION field in a separate Description window. (Now you click View and Description to display the description in the Fields list.)

Note: REMARKS and DESCRIPTION are keywords and must be present in the procedure.

Example Linking GGVALUES to Your Data Source

The following annotated example shows the procedure that retrieves information for the Values List window. This sample procedure links the description table, GGVALUES, to the data source against which the current report is being generated. The variables &TBNAME and &FIELD dynamically provide the name of the data source and the values of the selected field, respectively. The procedure retrieves descriptions from the DESCRIPTION field in the GGVALUES description table. As the example below shows, this feature works best for a small number of fields whose values you want to highlight.

```
    SET LINES=5000
    SET PAGE=NOPAGE
    SQL FMI SET FILECASE UPPER

1.  JOIN &FIELD IN &TBNAME TO &FIELD IN GGVALUES AS J1
    TABLE FILE &TBNAME
2.  WRITE DESCRIPTION AS ''
3.        FST.&FIELDWFORMAT AS ''
    BY &FIELD AS ''
    &RECLIMIT
    ON TABLE &HOLDTYPE FORMAT XML
    END
```

1. The JOIN command links the values of the field that the user selected in the graphical tool, &FIELD, in the data source against which the current report is being run, &TBNAME, to &FIELD in your description table. The List window can now access the descriptions in your description table.

2. The WRITE command displays DESCRIPTION in the second column of the Values List window.

3. The variable &FIELDWFORMAT represents the formatted field value. Since there can be many instances of a specific value among your data, the FST prefix picks up only one of these values for display.

Note: DESCRIPTION is a keyword and must be present in the procedure.

Pointing to Your Procedures From the Tools' Calling Pages

In order for the graphical tools to run the procedures you created in the previous step, you need to specify the names of those procedures in the tools' calling pages. The calling pages for the various WebFOCUS views reside in the following files in your Web server's /ibi_html/workbnch directory:

View	Calling Page
MRE Administrator, Domain Admin, or Java User	mr_ie.htm

Syntax How to Configure Domain Builder to Point to Your Procedures

To configure Domain Builder to point to your procedures:

Edit mr_ie.htm (Microsoft Internet Explorer). Search for string *showDomainAdmin()*, add the lines shown in bold, and specify the names of the corresponding procedures.

In mr_ie.htm for Internet Explorer:

```
function showDomainAdmin()
{
  hideAllLayers();
  document.btnDomainAdmin.src = "domain_admin_on.gif";
  if( hitsDomainAdmin == 0 )
  {
   var innerHTML = "<APPLET CODEBASE='/ibi_html/javaassist'
   CODE='IBIMRADmin1.class' MAYSCRIPT=TRUE NAME='MRAdmin' ID='MRAdmin'
   ARCHIVE='IBIMRADmin1.jar' HEIGHT=475 WIDTH=700>";
   innerHTML += "<PARAM NAME=MODE VALUE='mradmin'>";
   innerHTML += "<PARAM NAME=output_context VALUE='_blank'>";
   if(ReportBrokerFlag)
     innerHTML += "<PARAM NAME=broker value='on'>";
   else
     innerHTML += "<PARAM NAME=broker value='off'>";
   innerHTML += "<PARAM NAME=ibiadhoc value='"+CGIName +"'>";
   innerHTML += "<PARAM NAME=ibiex value='"+CGIName +"'>";
   innerHTML += "<PARAM NAME=ibimrcgi value='"+CGIName +"'>";
   innerHTML += "<PARAM NAME=masterfex value='"tables_list_procedure"'>";
   innerHTML += "<PARAM NAME=fieldsfex value='"fields_list_procedure"'>";
   innerHTML += "<PARAM NAME=valuesfex value='"values_list_procedure"'>";
   innerHTML += "</APPLET>";

   document.all.layerDomainAdmin.innerHTML = innerHTML;
   hitsDomainAdmin ++;
 }
 else
 {
   document.applets.MRAdmin.refreshRepository();
 }
 document.all.layerDomainAdmin.style.display = "block";
 document.all.tblPoweredBy.width = 505;
 document.all.layerPoweredBy.style.display = "block";
}
```

where:

tables_list_procedure

Is the name of the procedure where you linked your description table for data sources.

fields_list_procedure

Is the name of the procedure where you linked your description table for fields.

values_list_procedure

Is the name of the procedure where you linked your description table for field values.

Note: The procedures must reside in a directory that is on the WebFOCUS Reporting Server's Cataloged Path.

Syntax How to Configure Managed Reporting Domains Environment to Point to Your Procedures

1. Edit mr_ie.htm (Microsoft Internet Explorer).
2. Search for string *showDomains()*, add the lines shown in bold and specify the names of the corresponding procedures.

In mr_ie.htm for Internet Explorer:

```
function showDomains()
{
 hideAllLayers();
 document.btnDomains.src = "domains_on.gif";
 if (hitsDomains == 0)
 {
   var innerHTML = "<APPLET CODEBASE='/ibi_html/javaassist'
   CODE='IBIManagedReportsApplet.class' MAYSCRIPT WIDTH=700 HEIGHT=475
   NAME='ManagedReporter' ID='ManagedReporter'
   ARCHIVE='IBIManagedReportsApplet.jar' ALT='Please upgrade your Browser
   to run this Java Applet'>";
   innerHTML += "<PARAM NAME=CONTAINEDIN VALUE='Frame'>";
   innerHTML += "<PARAM NAME=MAINWINDOWTITLE VALUE='Managed Reporter'>";
   innerHTML += "<PARAM NAME=output_context VALUE='_blank'>";

   if( ReportBrokerFlag )
     innerHTML += "<PARAM NAME=BROKER VALUE='on'>";
   innerHTML += "<PARAM NAME=ibiadhoc value='"+CGIName +"'>";
   innerHTML += "<PARAM NAME=ibiex value='"+CGIName +"'>";
   innerHTML += "<PARAM NAME=ibimrcgi value='"+CGIName +"'>";
   innerHTML += "<PARAM NAME=masterfex value='"tables_list_procedure"'>";
   innerHTML += "<PARAM NAME=fieldsfex value='"fields_list_procedure"'>";
   innerHTML += "<PARAM NAME=valuesfex value='"values_list_procedure"'>";
   innerHTML += "</APPLET>";
   document.all.layerDomains.innerHTML = innerHTML;
   hitsDomains ++;
 }
 else
 {
     document.applets.ManagedReporter.refreshDomains();
 }
 document.all.layerDomains.style.display = "block";
 document.all.tblPoweredBy.width = 505;
 document.all.layerPoweredBy.style.display = "block";
}
```

where:

tables_list_procedure

Is the name of the procedure where you linked your description table for data sources.

fields_list_procedure

Is the name of the procedure where you linked your description table for fields.

values_list_procedure

Is the name of the procedure where you linked your description table for field values.

Note: The procedures must reside in a directory that is on the WebFOCUS Reporting Server's Cataloged Path. .

Example **Pointing to GGSOURCE, GGFIELDS, and GGVALUES**

The following example shows how to point to GGSOURCE, GGFIELDS, and GGVALUES from the calling pages:

```
<param name=masterfex value="ggsource">
<param name=fieldsfex value="ggfields">
<param name=valuesfex value="ggvalues">
```

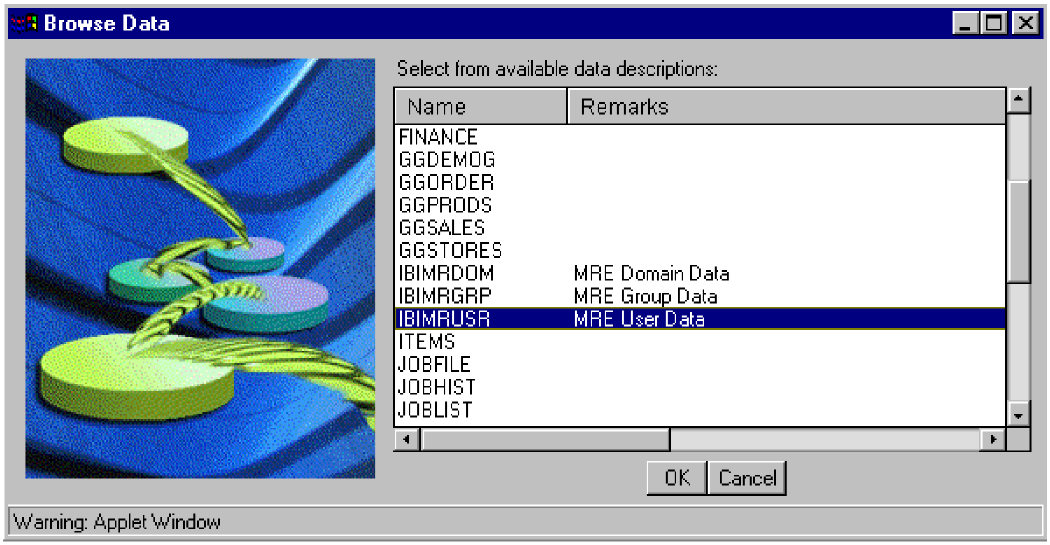
Viewing Descriptive Information

Now that you have provided descriptive information and pointed to the linked tables, you and your users can view this information in the graphical tools.

Viewing Data Source Descriptions

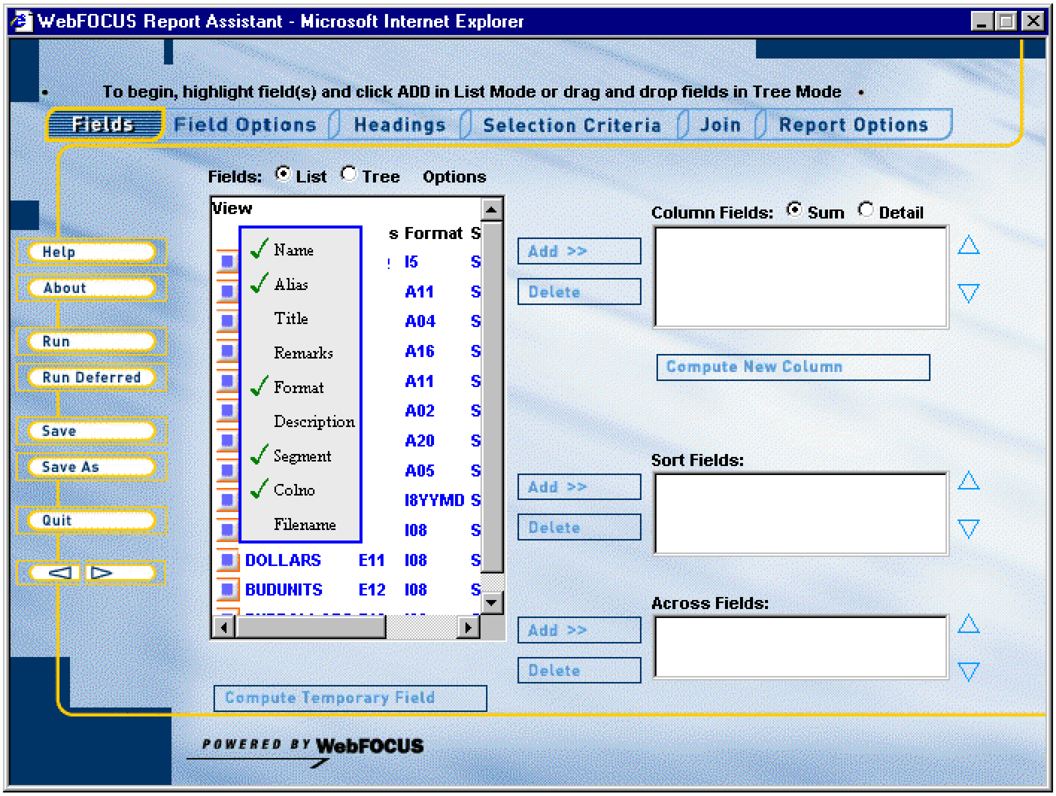
The following screen shows the Tables List window, which opens when you begin to create a report or graph with the Report Assistant or Graph Assistant.

Data source names appear in the first column. Brief descriptions appear in the Remarks column.



Viewing Field Descriptions

The following screen shows the Fields List window (in Report Assistant), which opens when you select a data source from which to create a report or graph with the Report Assistant or Graph Assistant.



Field names appear in the first column. Brief descriptions appear in the Remarks column. More detailed descriptions appear in the Description column.

Click *View* to select the columns you want to display in the List window.

CHAPTER 19

Additional Administration Topics

Topics:

- Managing Deferred Workload
- Report Assistant Parameters and Methods
- Selecting the Master File in Report Assistant
- Selecting the Tool Type for Report Assistant and Graph Assistant
- Managed Reporting Browser Window Feature
- Using Launch Pages Outside the Default Repository
- Debugging

These topics contain additional information for Administrators about Deferred Receipt, Report Assistant and Graph Assistant, browser window features, and tracing the WebFOCUS Client and Java Applet.

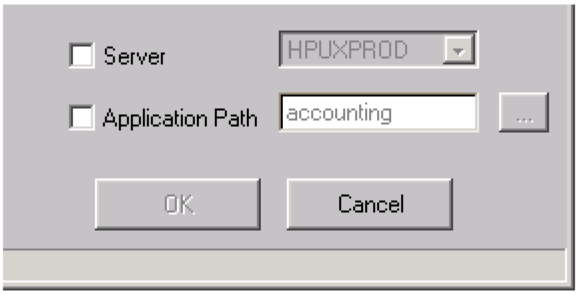
Managing Deferred Workload

You can connect from a single WebFOCUS Client installation to multiple WebFOCUS Reporting Servers. This means that it is possible for a single user to have deferred tickets for output residing on multiple servers. Moreover, these servers can be on different platforms and may require different user IDs. Users have access to all their deferred output, regardless of its location, and are prompted for credentials automatically as needed.

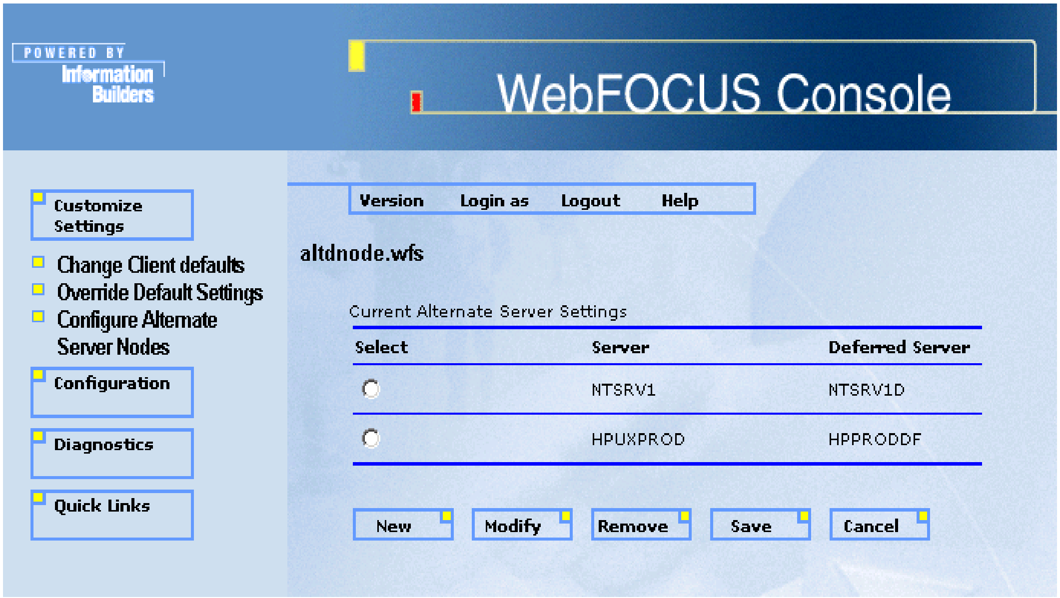
There are administrator settings for managing deferred workload. There can be up to one alternate deferred server per immediate server to separate interactive and deferred processing. You can limit the number of server agents allocated to handling deferred requests and the number of deferred requests a given user can process at one time (these features are not available on OS/390 MVS). On OS/390 MVS, the UNIQUE global keyword restricts simultaneous server connections to one per logon ID, which can be used to manage both deferred and interactive workload when server authentication is used.

Understanding Alternate Deferred Servers

Your can configure an alternate deferred server for one or more of your interactive servers. This causes deferred requests to run against a specific server and be routed to another server for processing. For example, if you are building a report in a domain that has a server set to HPUXPROD and you do not change this setting:



The report will run against HPUXPROD, but will run deferred against HPPRODDF because of the relationship configured in the WebFOCUS Client Console:

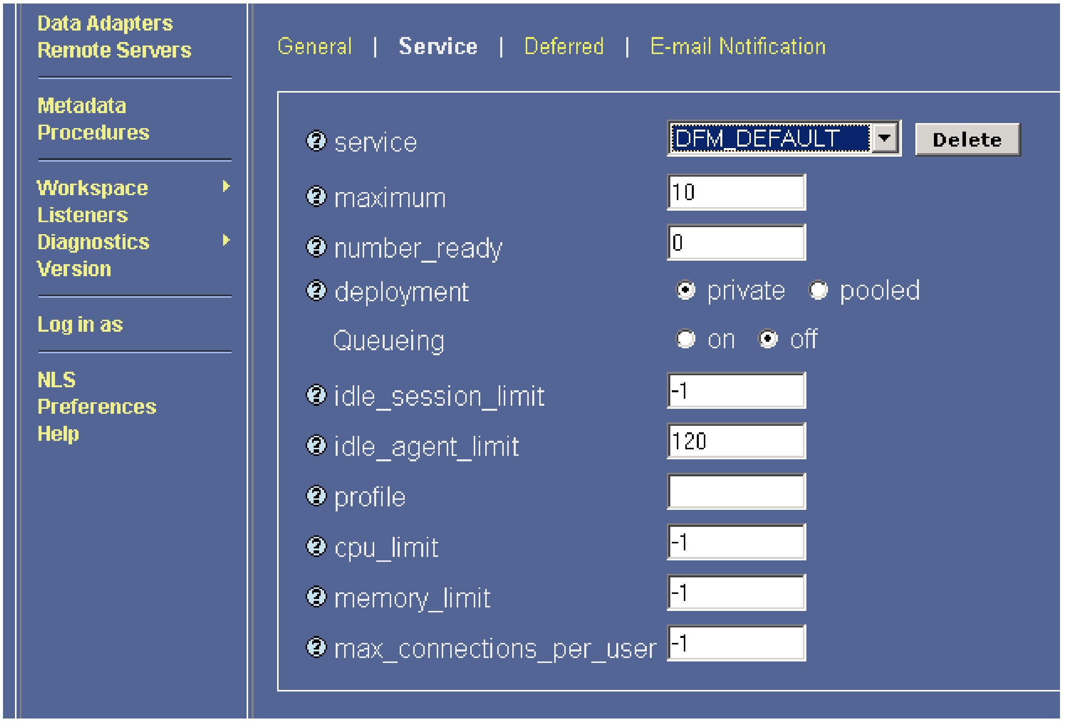


Configuring alternate deferred servers is one way to manage deferred workload. Typically, the alternate deferred server is given fewer processing resources since users are not waiting interactively for the request to finish. This allows the interactive servers to have relatively more processing resources.

If you do not have access to the WebFOCUS Client Console, contact your WebFOCUS Administrator or see the *Summary of New Features* manual.

Configuring Deferred Listener Options

You can also manage the resources allocated to processing deferred requests without configuring additional servers. The WebFOCUS Server Web Console for a specific server allows you to configure workload settings for deferred requests independently of interactive requests. For example, you can set the max_connections_per_user to 1 for the Deferred Service while allowing users to submit unlimited concurrent interactive requests.



If you do not have access to the WebFOCUS Server Web Console, contact your WebFOCUS Server Administrator or see the *iWay Server Administration for UNIX, Windows, OpenVMS, OS/400, OS/390 and z/OS* manual.

Note: The WebFOCUS Server Web Console is not available on OS/390 MVS servers.

Deferred Report Expiration Setting

The WebFOCUS Reporting Server has an output expiration setting that controls when deferred output is purged from the WebFOCUS Reporting Server. This setting is made in the server configuration file (NT and UNIX) and the deferred receipt listener node block (on OS/390).

Syntax How to Control Purging of Deferred Output

```
dfm_maxage={0|n}
```

where:

`0`

Indicates no expiration is configured.

`n`

Indicates *n* days until expiration.

No setting means that the default of 30 days will be in effect.

The number of days until expiration are displayed next to each report. On the last day, the value Today is displayed.

Note to Administrators: Cleanup of deferred output stored on the WebFOCUS Reporting Server is facilitated by the Deferred Management listener, which checks every time it wakes up. The listener's sleep interval is defined by the dfm_int_max parameter which defaults to 30 seconds if not specified. For more information about this and related parameters, click *Deferred*, followed by *Keyword Reference* under the WebFOCUS Reporting Server's Web Console Help link.

If a deferred report is not saved or deleted prior to its expiration, the output is automatically deleted from the WebFOCUS Reporting Server's dfm_dir directory and the deferred report is moved to the Unknown category in the Deferred Report Status Interface. From here, the user can only delete the orphaned report.

Report Assistant Parameters and Methods

HTML Report Assistant is coded using JSPs. The IBIRPASSTBean is called from a JSP and passes several parameters. All of the following parameters are present in the file, but depending on access rights and the capability of the Report Assistant version, some parameters may not be used.

Reference Master Dialog File mastdlg.jsp

The current input parameters for the Master Dialog file, mastdlg.jsp, are as follows:

Parameter	Definition
IBIjavapath	String representing the WebFOCUS Javaassist directory.
DialogFilePrefix	String representing the NLS dialog file prefix.
COOKIE	String representing a cookie set by the browser.
MRcgiPrefix	String representing the MRCGI path. This is the URL for the CGI. For example: `http://pgmrcent/cgi-bin/ibi_cgi/webapi.dll`
Standalone	String representing Boolean for standalone.
CurrentDomain	String representing the Domain Name Title. To drill down, you need this parameter. For example: untitled/untitled.htm. This will be listed as unusable for self-service users.
DomainName	String representing the Domain Name HREF. The domain name is associated with CurrentDomain. This will be listed as unusable for self-service users.
RunUrl	Run a URL string before a created procedure in Report Assistant.
SaveUrl	Save a URL string before a created procedure in Report Assistant. This parameter represents the URL that will be used to save procedures to a user-specified environment.
SaveAsUrl	Save a URL string before a created procedure in Report Assistant. This parameter represents the URL that will be used to save procedures to a user-specified environment.
Type	Refers to the data source being used.
Dashboard	String representing Boolean for Dashboard.

Parameter	**Definition**
ReportFlag	Sets one of the following modes: 0 - Server Administration 1 - Managed Reporting Administration 2 - Managed Reporting Administration Reporting Objects 3 - Managed Reporting Objects 4 - Managed Reporting My Reports 5 - Dashboard Reporting Objects 6 - Dashboard My Reports 7 - Custom User Bypass 8 - Managed Reporting Administration User Manager 9 - Managed Reporting Administration Alert Wizard
appserverdirectory	Location of main JSPs.
IBIServer	WebFOCUS Reporting Server.
IBIApp	NODE on WebFOCUS Reporting Server.

Reference Report Assistant File rpasstie.jsp

The current input parameters for the Report Assistant file, rpasstie.jsp, are as follows:

Parameter	Definition
FOCEXEC	String representing a procedure. The string is the request that was generated through Report Assistant. Passing this parameter to the SAVEURL parameter allows you to direct the procedure to any location.
IBIjavapath	String representing the WebFOCUS Javaassist directory.
DialogFilePrefix	String representing the NLS dialog file prefix.
Master File	Name of the Master File selected.
COOKIE	String representing a cookie set by the browser.
MrcgiPrefix	String representing the MRCGI path. This is the URL for the CGI. For example: `http://pgmrcent/cgi-bin/ibi_cgi/webapi.dll`
CurrentDomain	String representing the Domain Name Title. To drill down, you need this parameter. For example: untitled/untitled.htm. This will be listed as unusable for self-service users.
DomainName	String representing the Domain Name HREF. The domain name is associated with CurrentDomain. This will be listed as unusable for self-service users.
Standalone	String representing Boolean for standalone.
RunUrl	Run a URL string before a created procedure in Report Assistant.
SaveUrl	Save a URL string before a created procedure in Report Assistant. This parameter represents the URL that will be used to save procedures to a user-specified environment.
Dashboard	String representing Boolean for Dashboard.
MyReport	For the ability to save a Reporting Object as a My Report.
MyGroup	Reporting Group to which the procedure or Reporting Object belongs.

Parameter	Definition
ReportFlag	Sets one of the following modes: 0 - Server Administration 1 - Managed Reporting Administration 2 - Managed Reporting Administration Reporting Objects 3 - Managed Reporting Objects 4 - Managed Reporting My Reports 5 - Dashboard Reporting Objects 6 - Dashboard My Reports 7 - Customer User Bypass 8 - Managed Reporting Administration User Manager 9 - Managed Reporting Administration Alert Wizard
MyGroupHREF	HREF for Reporting Objects group.
Fexname	Name of fex associated with the Reporting Object name, for example, MyReports/sharp.fex.
ReportType	REPORT or GRAPH.
MyFilterGroup	Reporting Objects name under the group.
ROName	Reporting Objects name.
MREFlags	Set by the CGI to determine the type of report.
appserverdirectory	Location of main JSPs.
IBIServer	WebFOCUS Reporting Server.
IBIApp	NODE on WebFOCUS Reporting Server.
userHREF	Name of user HTML file, for example, john.htm.

Methods Called by HTML Report Assistant in IBIRPASSTBean

This section lists method names and describes the function of each method in the IBISrvBaseBean class. This is the main bean from which all Managed Reporting requests can be called using the JSPs.

`getFields`

Returns a list of fields from the WebFOCUS Reporting Server separated by semicolons.

`getJSInformation`

Generates an array of objects representing all fields of the input Master File. It also generates parsed information related to a saved procedure. This is the main JavaScript method when opening Report Assistant or Graph Assistant.

`executeMasterRequest`

Returns a list of Master Files from the WebFOCUS Reporting Server in a SELECT HTML format.

`getStandardReportFiles`

Gets procedures from a Standard Reports domain.

`getOtherFiles`

Gets other files from a domain.

`populateDrillTreeInformation`

Returns a vector of the JavaScript for a drill-down tree of a specific domain.

`getJoinToolsJSInformation`

Returns JavaScript information related to the HTML Join tool.

`getJoinToolFields`

Gets a list of fields for the HTML Join tool in a SELECT HTML format.

`getComputeJSInformation`

Returns a string of JavaScript information pertaining to the HTML Compute Tool.

`getFieldValues`

Returns a list of values based on the field selected. The output will be in a SELECT HTML format.

`getConditionalFieldValues`

Gets a list of Condition field values.

`getMyReportFilters`

Gets a vector of My Report filters for a specific domain, group, and procedure.

`getReportObjectsFilters`

Gets a list of Reporting Object filters based on the domain, group, and filter folder.

`getMyReportsElementFex`

Gets the string representation of a My Reports procedure.

`getMyReportsElementData`

Gets a My Report object (IBIElementData) depending on the current domain, group, and procedure.

`getReportObjectsElementData`

Returns a vector of the Reporting Objects data.

`populateFilterTreeInformation`

Returns a tree of JavaScript information for a filters directory.

`getMyReportsParsedFex`

Returns a parsed base procedure string from a My Report object.

`getStandardReportVector`

Gets an unparsed IBIGroupData vector containing a Standard Reports data structure.

`getDomainVector`

Gets an IBIElementData vector containing a list of domains.

`getOtherVector`

Gets an unparsed IBIElementData vector containing Other data structures.

`doXSLTTransformation`

Calls the DDXSLTransform module.

`doXSLTTransformation`

Calls the DDXSLTransform module.

`getSignonCookie`

Gets a cookie related to signon onto Managed Reporting.

`populateWhereTreeInformation`

Returns a vector of JavaScript information for the HTML Where tool.

`getFieldValueJSArray`

Returns a JavaScript array representation of field values based on the Master File and field.

`getFieldValuesLIST`

Returns a string of field values in LIST HTML format. This method is used in the HTML Where tool.

`populateFieldTreeInformation`

Returns a vector of JavaScript information to populate a field list in the tree data structure.

`getMyReportsFexVector`

Gets a vector of all My Report procedures depending on the current domain and group.

`getFieldValuesVector`

Returns a vector of raw field values.

`getFieldVector`

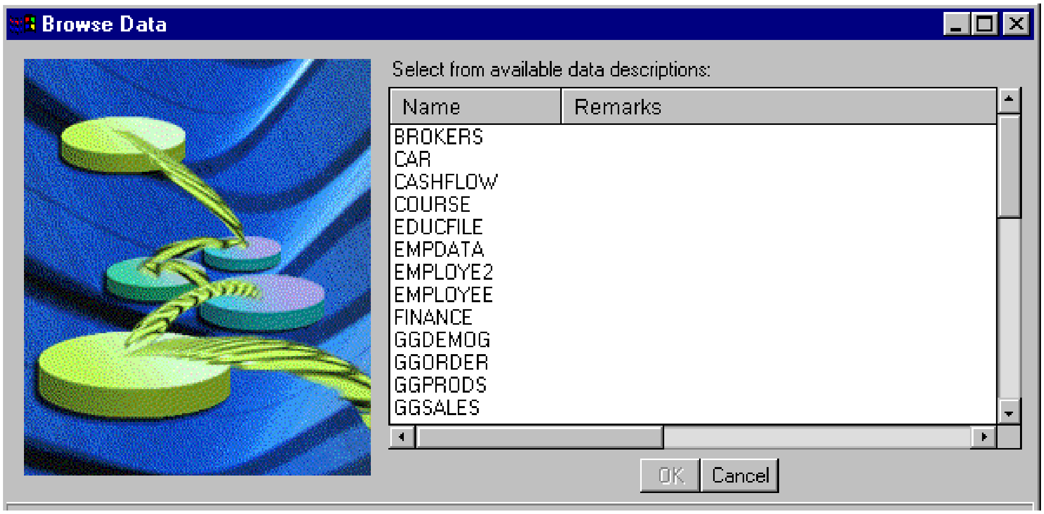
Returns a vector of fields from the WebFOCUS Reporting Server.

`getMRSaveInfo`

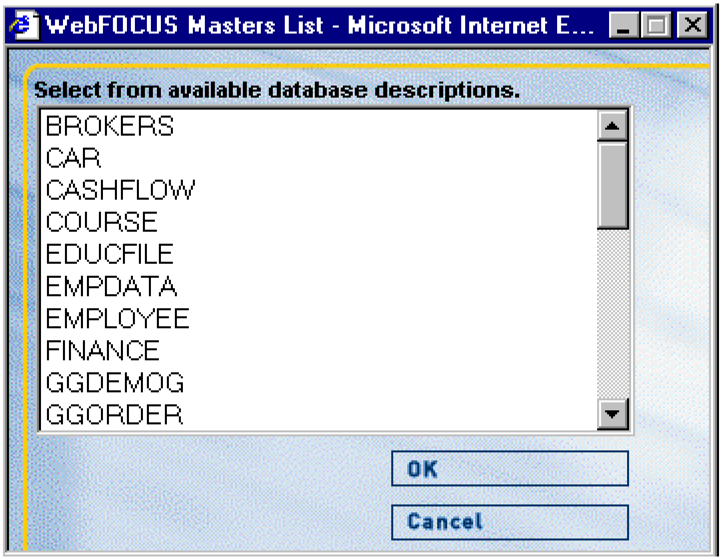
Returns a string of HTML statements representing a list of saved My Report procedures in a Managed Reporting group.

Selecting the Master File in Report Assistant

To choose the Master File you want to work with, select your file and click *OK*. To search for a specific Master File, use the scroll bar.



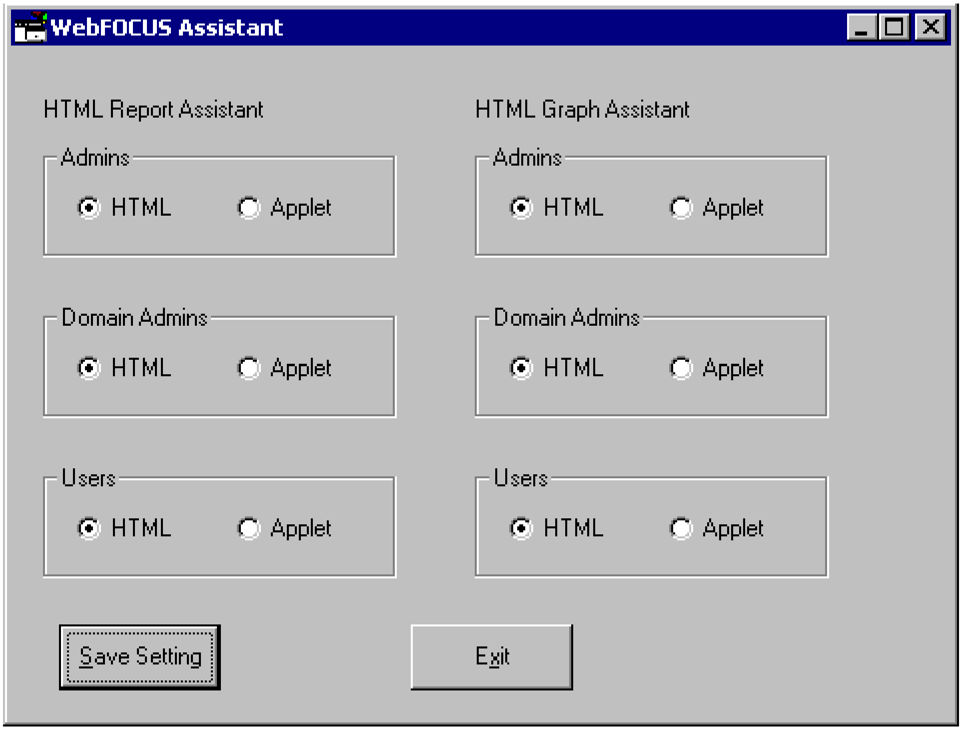
In the self-service version, you can also type the first character of the name of the Master File anywhere in the list to jump to the name of that Master File.



Selecting the Tool Type for Report Assistant and Graph Assistant

In WebFOCUS Release 5 Version 2, HTML is the default tool type for the Report Assistant and Graph Assistant. You can change the tool type (choices are either HTML or Applet) for each tool, per user type by running the WFAssist.exe utility located in the /ibi/WebFOCUS52/utilities directory.

In Dashboard, users can select the tool type from the Options menu in the banner. For details, see the WebFOCUS Managed Reporting End User manual.



Procedure How to Select the Tool Type for Report and Graph Assistant

1. In the /ibi/WebFOCUS52/utilities directory, open the WFAssist.exe utility. The WebFOCUS Assistant dialog box opens.
2. Select the desired tool type per user type by selecting the:
   - HTML radio button for the HTML version of the tool.
   - Applet radio button for the applet version of the tool.
3. Click *Save Setting*.

Managed Reporting Browser Window Feature

You can utilize all available JavaScript options for controlling the way a browser window looks. This allows you to customize Web browser windows so that they conform to their application and organizational standards.

This feature does not change the default appearance or functionality of any WebFOCUS Managed Reporting Applet or WebFOCUS HTML features. It specifically enables you to control the browser window look and options.

Note: This feature is only available when using an Internet Explorer browser.

WebFOCUS Managed Reporting Implementation

You can control the way a browser window looks in Managed Reporting with the addition of JavaScript code to the following:

- **Managed Reporting logon page**—mr_ie.htm is located under /ibi_html/workbnch/ on the server where WebFOCUS is installed.
- **OLAP Control Panel file**—drill.html is located under /ibi_html/javaassist on the server where WebFOCUS is installed.
- **HTML User Environment and Deferred Report Status Interface**—mrchft.def is located under drive:\ibi\client45\conf\etc on the server where the WebFOCUS Client is installed.

Reference JavaScript Code

The following JavaScript code, located in the heading of the HTML logon pages for Managed Reporting and the OLAP Control Panel file, launches the default browser window look and options.

```
<SCRIPT LANGUAGE=JAVASCRIPT>
function doShowDoc(u,t)
{
t=t.replace(' ','A');
window.open(u,t);
}
</SCRIPT>
```

where:

u

Is the URL where the HTML for the browser window is located.

t

Is the new browser window name.

Caution: These parameters are set internally by WebFOCUS and must not be changed.

Site Customization

To customize the look of a window created by WebFOCUS Managed Reporting, you must make manual changes to the JavaScript code and migrate them to any future version of WebFOCUS.

To customize the browser window, determine the desired browser window options (for more information, see *Browser Window Options* on page 19-18) and JavaScript code additions, and add them after the last parameter in the JavaScript window.open call.

Example Customizing a Browser Window

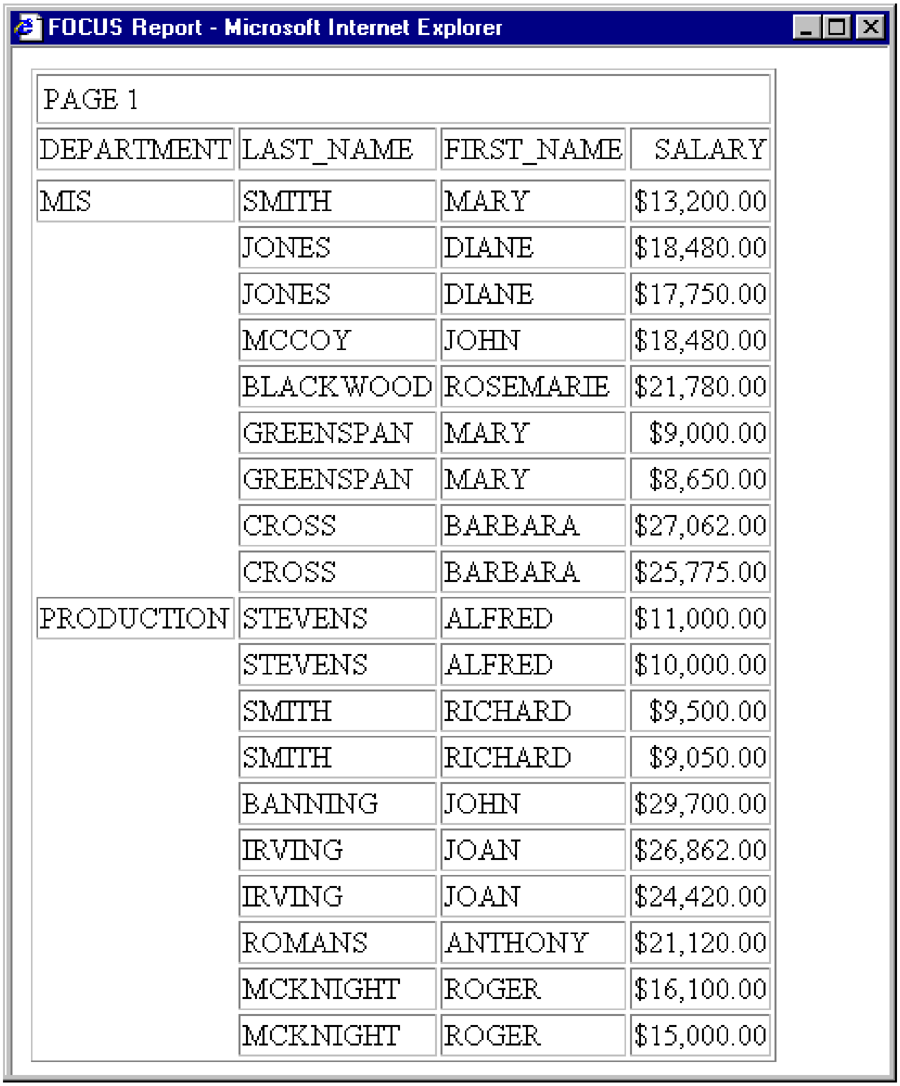
If you want to suppress all browser controls, including the location bar (address or URL), the JavaScript code presented in *JavaScript Code* on page 19-15 must be changed as follows:

```
window.open(u,t);
```

to

```
window.open(u,t,"location=0");
```

The following window displays without browser controls such as location bars, toolbars, and scrollbars:



PAGE 1			
DEPARTMENT	LAST_NAME	FIRST_NAME	SALARY
MIS	SMITH	MARY	$13,200.00
	JONES	DIANE	$18,480.00
	JONES	DIANE	$17,750.00
	MCCOY	JOHN	$18,480.00
	BLACKWOOD	ROSEMARIE	$21,780.00
	GREENSPAN	MARY	$9,000.00
	GREENSPAN	MARY	$8,650.00
	CROSS	BARBARA	$27,062.00
	CROSS	BARBARA	$25,775.00
PRODUCTION	STEVENS	ALFRED	$11,000.00
	STEVENS	ALFRED	$10,000.00
	SMITH	RICHARD	$9,500.00
	SMITH	RICHARD	$9,050.00
	BANNING	JOHN	$29,700.00
	IRVING	JOAN	$26,862.00
	IRVING	JOAN	$24,420.00
	ROMANS	ANTHONY	$21,120.00
	MCKNIGHT	ROGER	$16,100.00
	MCKNIGHT	ROGER	$15,000.00

If you want to suppress the location bar and status bar but display the scroll bars, you must change the JavaScript code presented in *JavaScript Code* on page 19-15 as follows:

```
window.open(u,t);
```

to

```
window.open(u,t,"location=0,status=0,scrollbars=1");
```

Procedure How to Control a Browser Window in the Managed Reporting HTML User Environment and Deferred Report Status Interface

1. Make a backup or copy of *drive*:\ibi\client45\conf\etc\mrchft.def.
2. Edit *drive*:\ibi\client45\conf\etc\mrchft.def.
3. Search for the following string:

   ```
   window.open
   ```

4. Add the browser option ("location=0") to the window.open options before the last closing parenthesis. For example, in the name, HTML_USER_HEADER section, change:

   ```
   nl,text,window.open(fixurl(aa),name);
   ```

   to

   ```
   nl,text,window.open(fixurl(aa),name,"location=0");
   ```

   Note:

   - There are six instances of window.open. Apply this change to each instance.
   - The mrchft.def file is a WebFOCUS internal script file. Each line or continuation of a line must begin with the text 'nl,text'.

5. Clear the browser cache prior to testing.

Browser Window Options

You can modify the following browser window options:

- Menu bar
- Toolbar
- Location bar
- Directories bar
- Status line
- Scroll bars
- Ability to resize the window
- Closing a child window when a parent window closes.
- Width (in pixels)
- Height (in pixels)
- Screen alignment (from the left of the screen, from the top of the screen).

Using JavaScript, you must specify all the options you want in your Managed Reporting browser window. Once an option is specified, there are no default values assumed.

Caution: The first two parameters (u and t) in the window.open call are set internally by WebFOCUS and must not be changed.

Example Setting Browser Window Options

The following example shows how to open a new window, called open_window, in the upper left corner of the window that displays the front page of Managed Reporting. The size of the new window will be 640x480 pixels. To accomplish this, include the following HTML code in the head of the original document:

```
<SCRIPT LANGUAGE=JAVASCRIPT>
function doShowDoc(u,t)
{
t=t.replace(' ','A');
window.open(u,t,menubar,toolbar,location,directories,status,scrollbars,
resizable,dependent,width=640,height=480,left=0,top=0);
}
</SCRIPT>
```

Browser Window Exceptions

WebFOCUS Managed Reporting does not create a browser window when you use:

- Open in new window option when right-clicking on a drill-down within a WebFOCUS report.
- A CTRL-N sequence to create a new browser instance.
- The following Administrator tools:
    - ReportCaster Console invoked from Managed Reporting. When you run a log report from the Console, the browser options cannot be controlled, since the applet does not create the browser window.
    - Two-Way Email option invoked from Managed Reporting. When you run the Job Log or Event Log from the Managed Reporting Two-Way Email option on the blue toolbar, the browser options cannot be controlled, since the applet does not create the browser window.

Managed Reporting has the ability to not process specific lines or blocks of FOCEXEC code. This section explains how to specify that Managed Reporting should ignore code in a FOCEXEC and provides an example using lowercase and uppercase syntax with the MRNOEDIT tag. This section also explains how to reference a Standard Report and how to execute a FOCEXEC that resides outside Managed Reporting, but on the WebFOCUS Reporting Server path.

Note: See the *WebFOCUS Security and Administration* manual for information about the availability of Managed Reporting internal variables.

Using Launch Pages Outside the Default Repository

Most sites will only use the Managed Reporting Repository directory, basedir, created by the installation program, which is found under install_dir/WebFOCUS52. This repository is referred to as the default repository because it is referenced by the variable MR_BASE_DIR in the WebFOCUS script file named install_dir/client52/wfc/etc/cgivars.wfs. If you modify your Managed Reporting signon page to include the MR_BASE_DIR variable for the purpose of overriding this setting, your launch pages will generate an error because they assume that the Standard Report will be found in the default repository.

You can make these launch pages work by doing the following:

1. Add the MR_BASE_DIR variables to your launch pages. For example:

```
<INPUT TYPE="HIDDEN"  NAME="MR_BASE_DIR"
VALUE="e:\ibi\WebFOCUS52\basedir_alt">
```

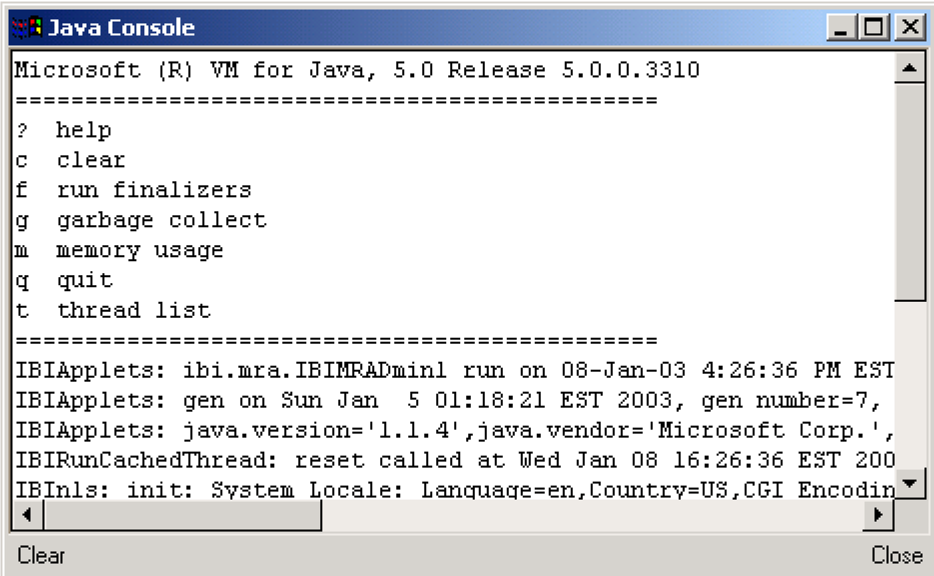
2. Comment out the PROTECT command in install_dir/client52/wfc/etc/ibidir.wfs by placing a # character at the front of the line. For example:

```
<if> IBIMR_action NE "MR_SIGNON" AND IBIMR_action NE "MR_CHANGE_PASS"
# <SET> MR_BASE_DIR(protect)
<endif>
```

Debugging

Activating Your Browser's Java Console

When you encounter problems with Java applets in the Internet Explorer, you can sometimes get valuable debugging information by looking in the Internet Explorer Java Console. Access this from the menu bar by clicking *View*, and then *Java Console*. The Java Console shows you which Microsoft Java Virtual Machine release you are using. You can also see messages from the IBI Java code, such as the Managed Reporting Java Gen number. Information Builders Customer Support Service (CSS) may ask you to check for specific messages in this console to aid in problem determination.



If the Java Console does not appear in your View menu, you may need to activate it. The way to activate this varies with each Internet Explorer release. In Internet Explorer version 6.0, enable the Java Console by selecting Tools, Internet Options..., Advanced, Microsoft VM, and Java console enabled.You must restart your browser for the changes to take effect.

Tracing the Java Applets

It is possible to increase the level of trace messages written to the Internet Explorer Java Console. This can be helpful for debugging purposes. Before carrying out the following steps, you should back up your mr_ie.htm file in case you accidentally corrupt it.

Procedure How to To Trace the Domain Builder Applet

1. Edit webfocus52/ibi_html/workbnch/mr_ie.htm and search for the JavaScript function:

   ```
   function showDomainAdmin()
   ```

2. Under this function, uncomment the following lines (remove the two slashes):

   ```
   //     innerHTML += "<PARAM NAME=FOCUStrace value='true'>";
   //     innerHTML += "<PARAM NAME=PROGRAMtrace value='true'>";
   ```

3. Save the file and either log onto Managed Reporting again or click your browser's Refresh button (if you are already logged on). You now see detailed trace messages in your Java Console.

   Note: While tracing is on and the Java Console is open, applet performance will be decreased. Keep the Java Console closed until you have reproduced the steps you are debugging in order to improve performance.

   You can copy the following trace lines to other JavaScript functions in order to trace the behavior of other applets:

   ```
   showUserAdmin() - the User Administration applet
   showDomains() - the Domains applet
   ```

Tracing the WebFOCUS Client

See the *WebFOCUS Security and Administration Manual*. Trace=ON.

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Reader Comments

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